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8.5 HIP Change Reporting

8.5.1 Overview

Gender: When referring to the Client, she/herself has been used throughout the SSM for simplicity. However, both genders, male and female may receive benefits.

A change is reported either by phone, fax or mail to a Call Center, Document Center, or Service Center. When a change related to a HIP recipient is reported, a task is created for a HIP workgroup to process. In addition, HIP change tasks are generated by the system, created by ICES alerts, created by internal users and forwarded by internal users. Upon receipt of a change report, the HIP WG 3 ES is expected to perform a search for any other AGs. If a recipient is receiving any other program benefits in addition to HIP and the change would effect the non-HIP case, the HIP WG 3 ES will create a Reported Change task to be processed by the (non-HIP) Changes WG 3 ES/ESA.

Note: When creating a Reported Change task to be processed by the (non-HIP) Changes WG 3 ES/ESA, be sure to create the task from within the non-HIP case. For example, if a HIP client is also receiving Food Stamps, create the task from the left navigation within the Food Stamp standard case .

At the completion of the application process for HIP, the Assistance Group (AG) for eligible Clients will be in a Conditional status – except those AGs for non-citizens eligible for Emergency Services only, which will be in an Open status. A change in the Conditional status will occur when the Client's Health Plan notifies the Service Center that the HIP Client has paid or not paid their POWER Account contribution. Current ICES functionality does not allow changes while the HIP AG is in a Conditional status.

Note: When the HIP WG 3 ES updates AEHIP with the POWER Account contribution information received from the health plan, the AG status is automatically updated to Open, Deny, or Close.

After the HIP AG status changes to Open, changes for HIP AGs during the 12-month eligibility period are limited based on program policy and defined scope. Changes fall into two basic categories:

- Those that result in ineligibility for HIP based on program policy and
- Those that potentially change (recalculate) the amount of the HIP recipient's POWER account contribution.

The Service Center will process HIP recipients requests to recalculate their POWER account contribution during the 12-month eligibility period based on program policy and defined scope. When a change includes processing a HIP recipient's request to recalculate her POWER account contribution, part of the Eligibility Review and Authorization task completed by the HIP SEC includes a review of the ES action on the recalculation request.

8.5.2 HIP Change Reporting Users

The majority of the activities that will be processed within HIP Change Reporting are from reported changes and the results of these reported changes. HIP WG 3 is the primary group that processes changes. Eligibility Specialists (ES) work within the HIP WG 3 Changes Queue. However, other workgroups process reported changes. The following table shows the different workgroups and their responsibilities related to processing changes to HIP cases and maintaining a HIP case.

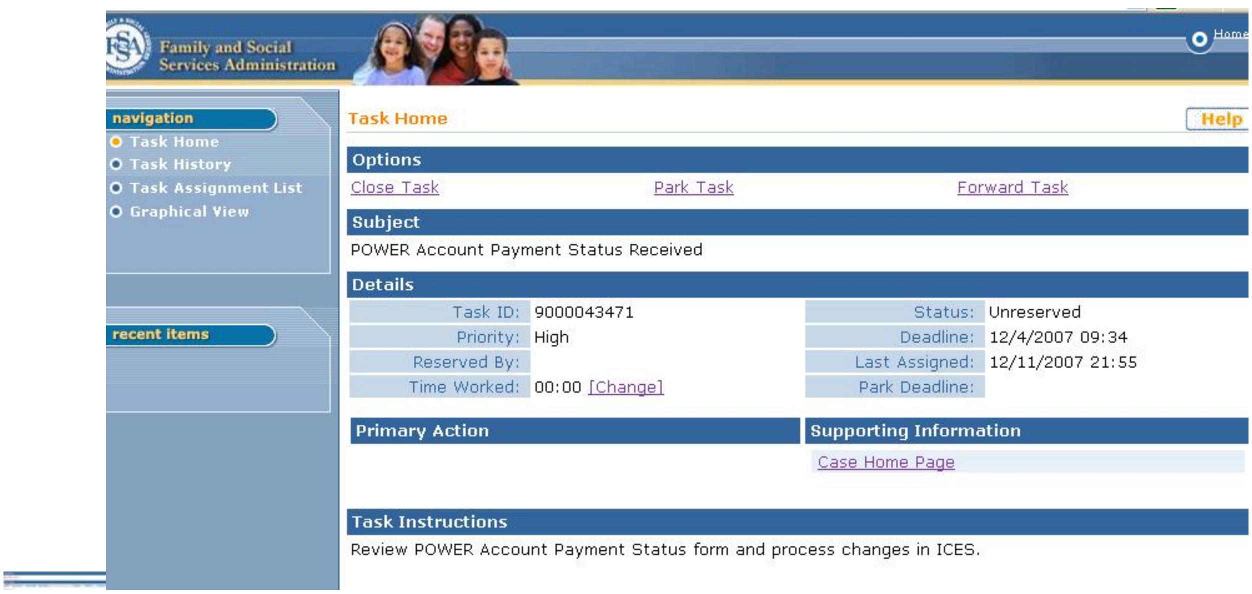
Table 1.1 HIP Change Reporting Users and Responsibilities

HIP Tier or Workgroup	Responsibilities
Tier 1 Agent (Call Center) Intake Consultant	► Forward calls, as necessary, to HIP Tier 2 Agents at the Call Center. ► Receive phone calls related to complaints and transfer to a HIP Tier 2 ES.
Tier 2 Agent (Call Center) Eligibility Specialist	► Receive calls to report changes, complaints, appeals, and suspected fraud. ► Create tasks to process changes requiring more lengthy processing time, to designated HIP WG 3.
Workgroup 3 (Changes)	► Process escalated change reports from Tier 2. ► Receive changes for HIP cases received via mail, fax, or web and processed through the Document Center. ► Process change reports for HIP cases.
Workgroup 8 (Document Specialist)	► Receive non-indexed documents and identify those that may be a change report. ► Review documents received in the queue and index documents to a case or person. ► Route documents to the appropriate workgroup.

8.5.3 Changes

8.5.3.1 Health Plan Reports HIP Recipient Has Paid POWER Account Contribution

The HIP recipient's Health Plan will send a completed POWER Account Payment Status form by mail or fax to the Document Center reporting that the Client has made their first POWER Account contribution. The document is scanned by the Document Center and becomes a POWER Account Payment Status Received task for an ES in HIP Workgroup (WG) 3.

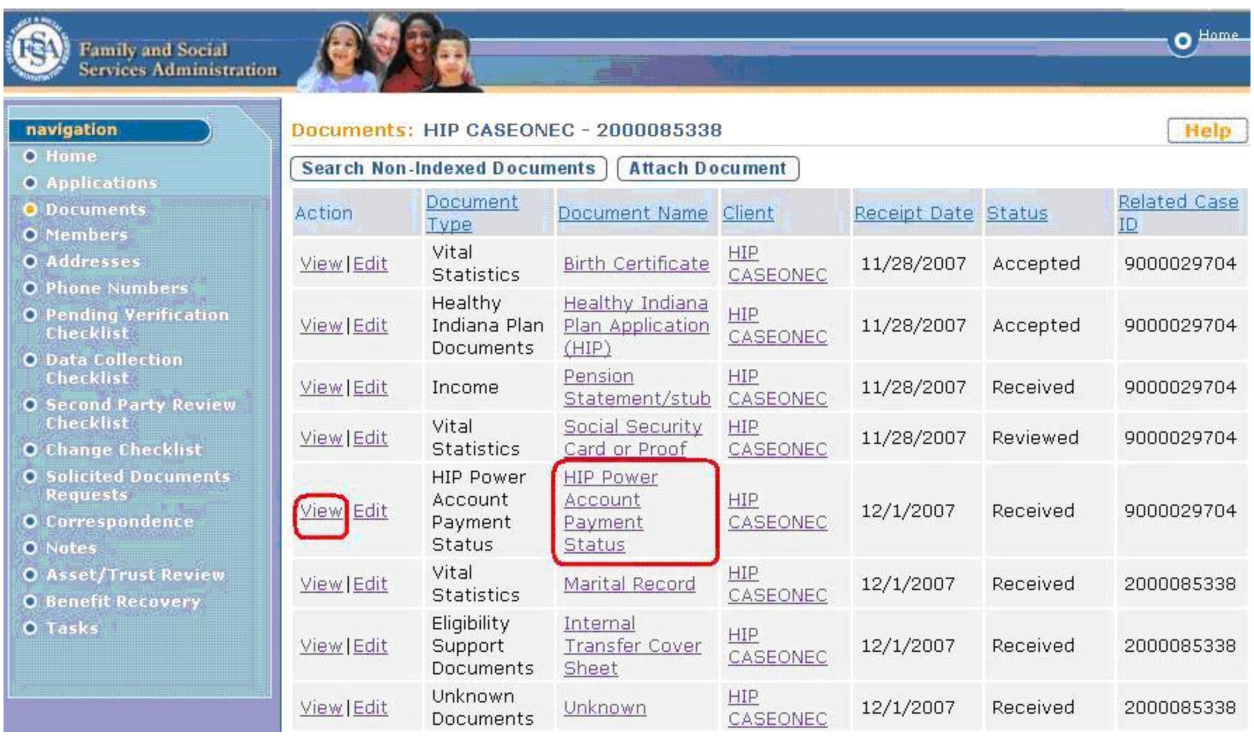
Step	Change Resulting from Power Plan Payment Notification
1.	On the Task Home page, view the task. 
2.	 The Subject lists the type of task that was received. In this case, the task is listed as POWER Account Payment Status Received.  • The Tasks instructions for "POWER Account Payment Status Received" are *Review POWER Account Payment Status form and process changes in ICES*. • From the Task Home Page, click *Case Home Page* under the Supporting Information cluster.

<table>
<tr><th>Step</th><th>Change Resulting from Power Plan Payment Notification</th></tr>
<tr><td>3.</td><td>

The WFMS navigates to the Case Home page. Click *Documents* from the Left Navigation bar.

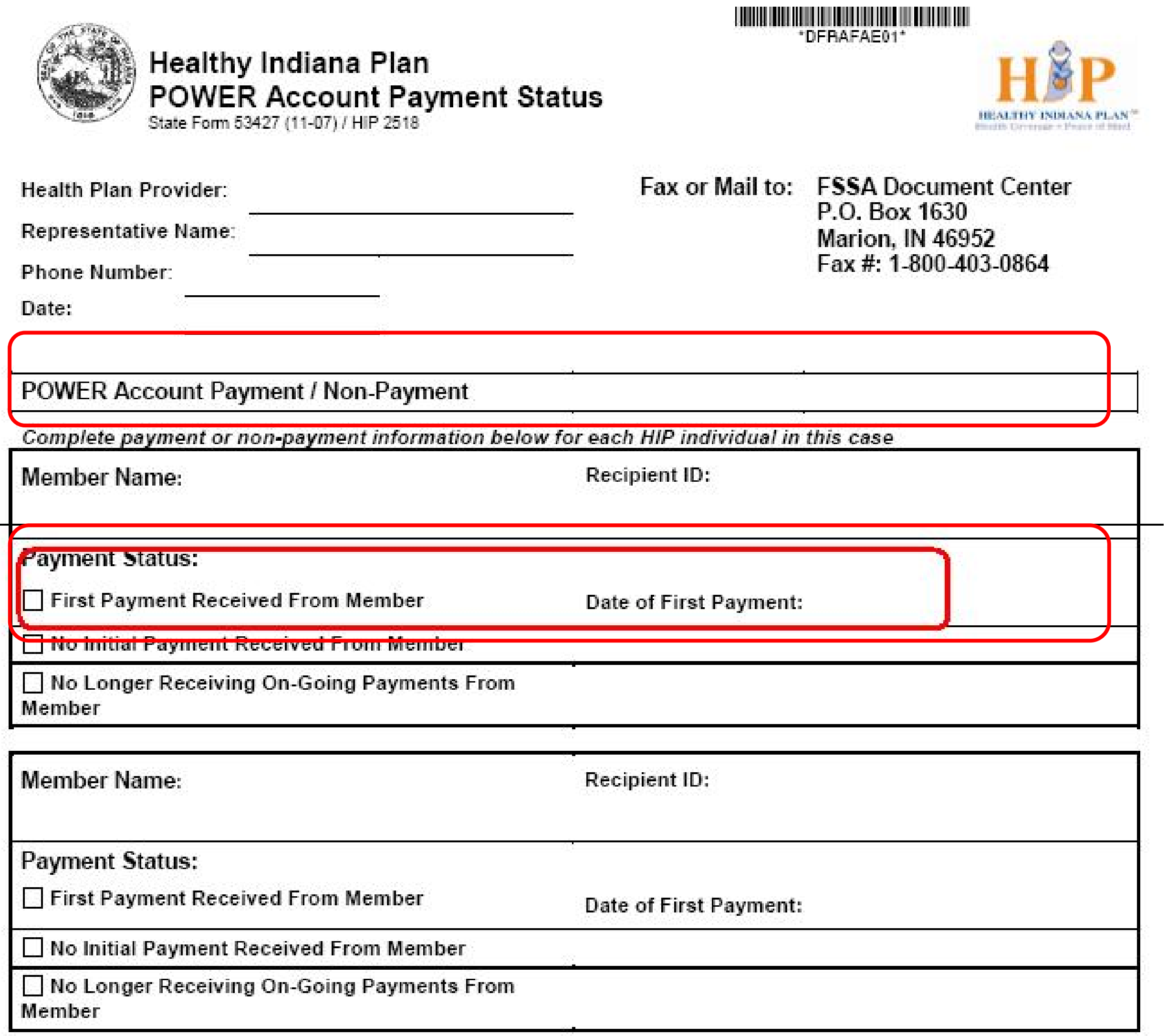
</td></tr>
<tr><td>4.</td><td>

On the Documents page, click View next to the Power Account Payment Status form.



</td></tr>
</table>

Step	Change Resulting from Power Plan Payment Notification
5.	Review the POWER Account Payment Status form received from the plan including the case name and number to confirm these match the WFMS case associated with the task being worked. • When a payment is received for a HIP Client with Conditional status, the health plan will check Initial Payment Received from Applicant and enter the Date of First Payment



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Healthy Indiana Plan
POWER Account Payment Status
State Form 53427 (11-07) / HIP 2518

HIP
HEALTHY INDIANA PLAN

Health Plan Provider:
Representative Name:
Phone Number:
Date:

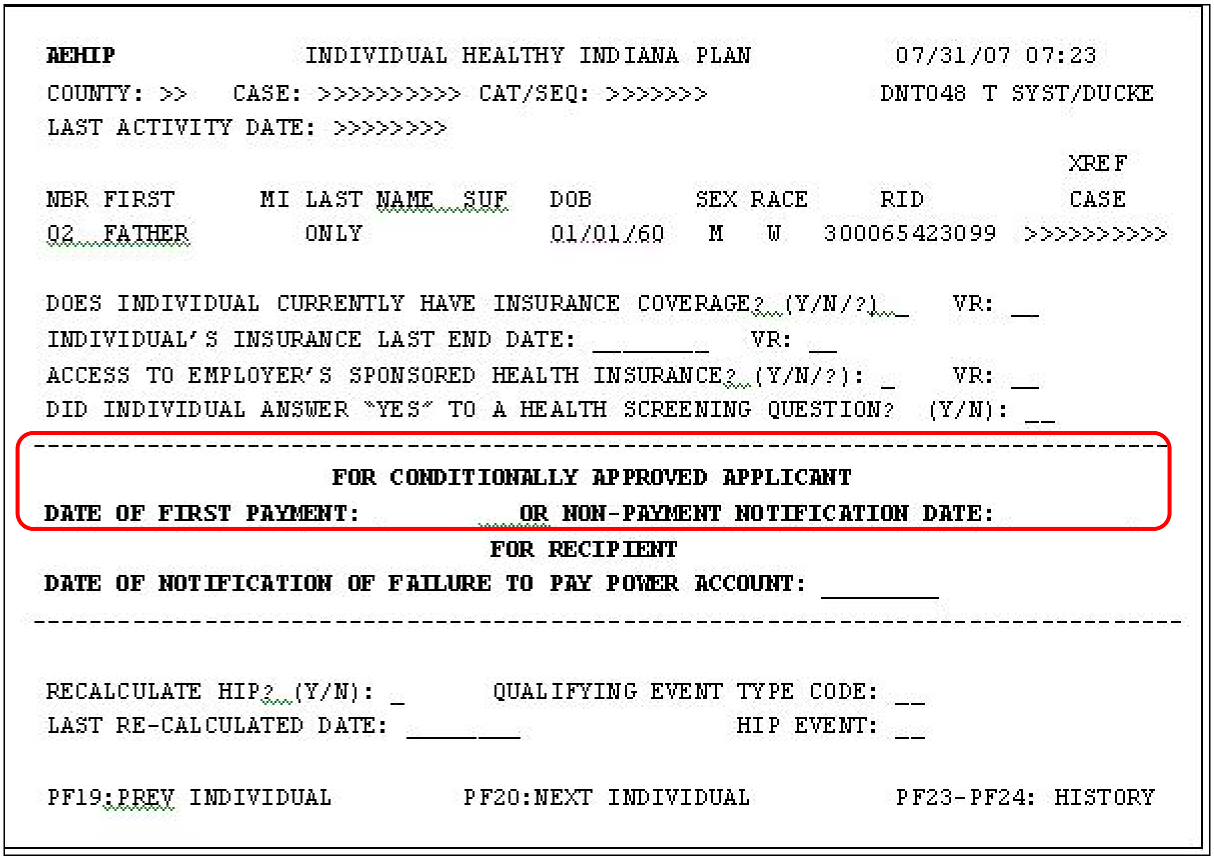
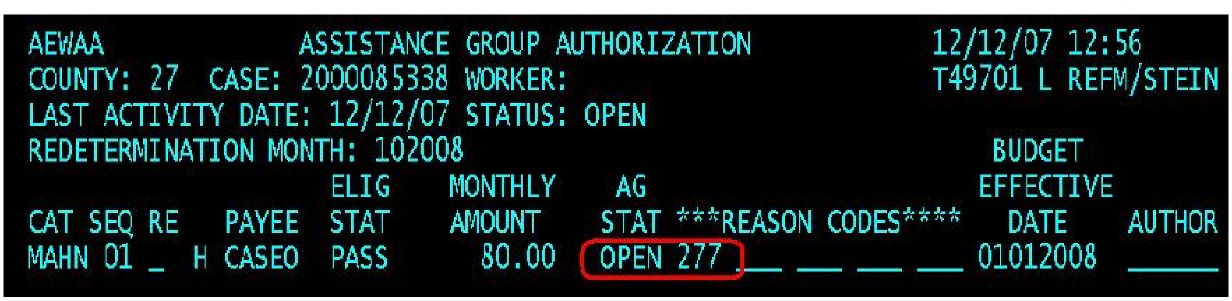
Fax or Mail to: FSSA Document Center
P.O. Box 1630
Marion, IN 46952
Fax #: 1-800-403-0864

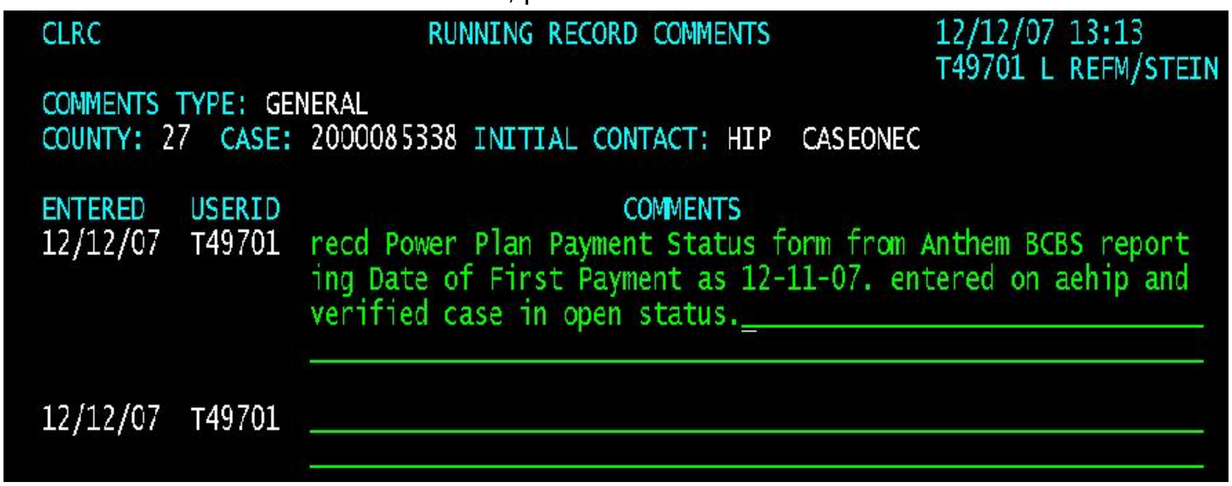
POWER Account Payment / Non-Payment

Complete payment or non-payment information below for each HIP individual in this case

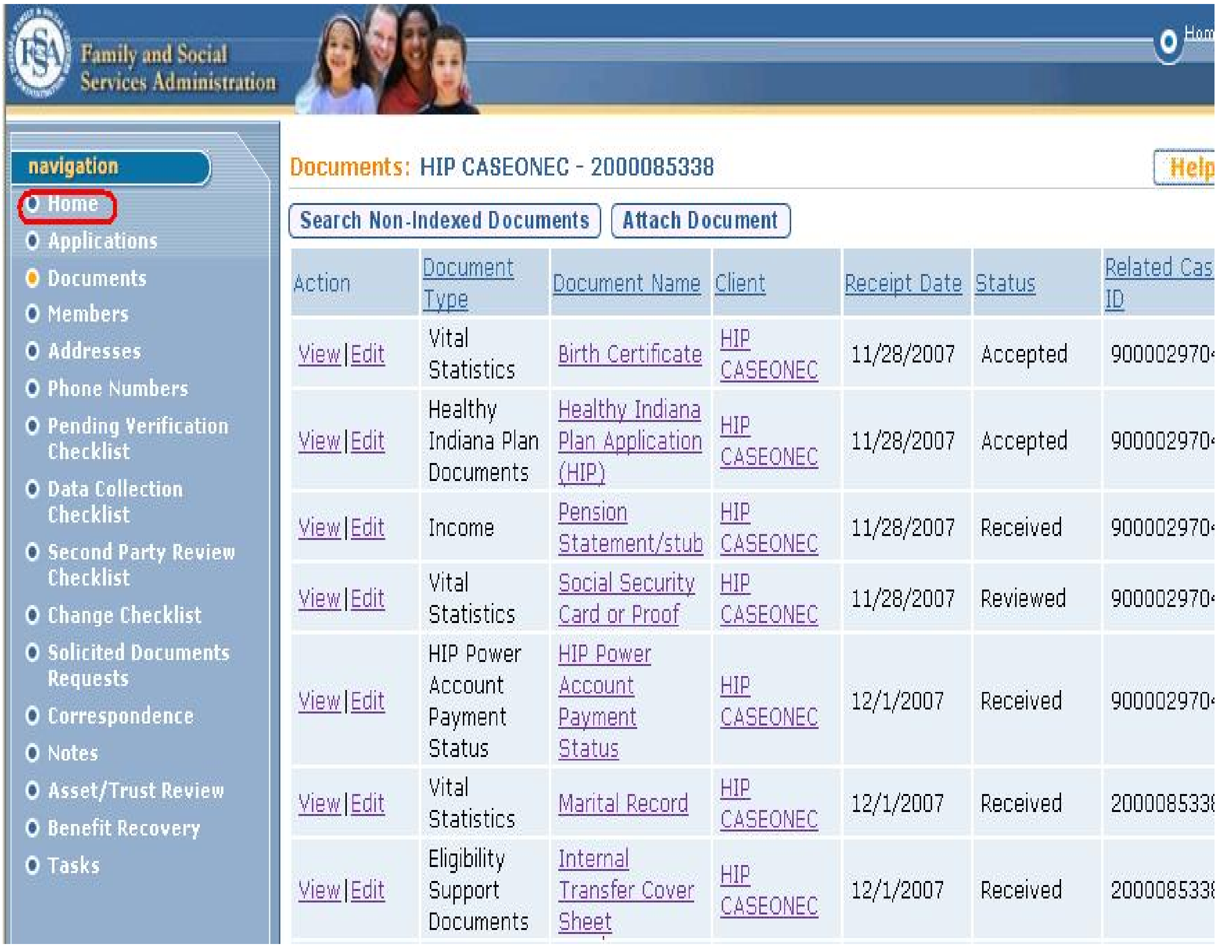
Member Name:	Recipient ID:
Payment Status: ☐ First Payment Received From Member	Date of First Payment:
☐ No Initial Payment Received From Member	
☐ No Longer Receiving On-Going Payments From Member	

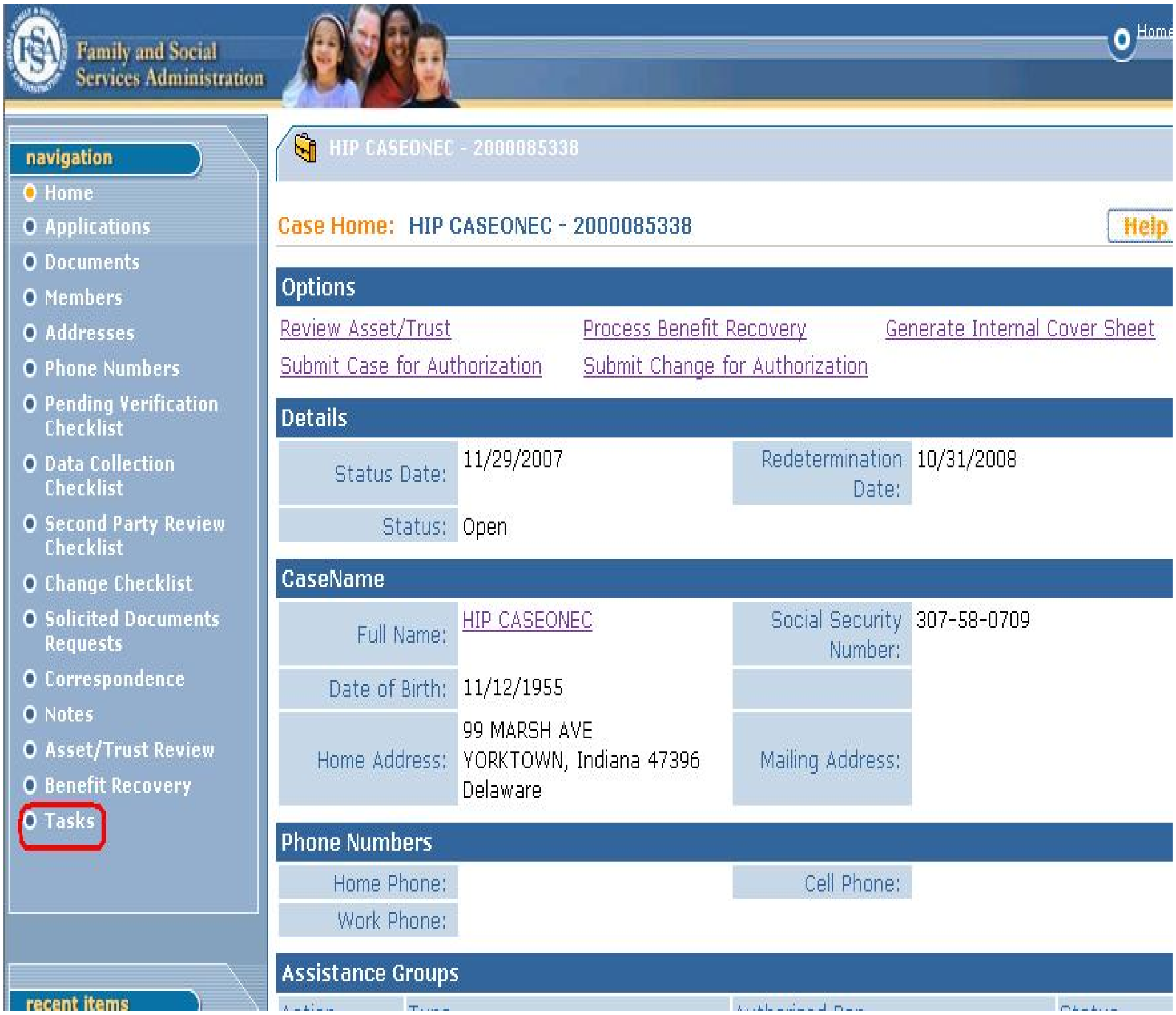
Member Name:	Recipient ID:
Payment Status: ☐ First Payment Received From Member	Date of First Payment:
☐ No Initial Payment Received From Member	
☐ No Longer Receiving On-Going Payments From Member	

Step	Change Resulting from Power Plan Payment Notification
6.	In ICES, access AEHIP for the ICES Case Number listed as the Case ID in WFMS. If there is more than one HIP recipient in the case, you may need to use PF 19 or 20 to view the screen for the HIP recipient indicated on the POWER Account Payment Status form. • Enter the Date of First Payment from the POWER Account Status Form into that field on AEHIP. • This entry will change the AG status on AEWAA from COND to OPEN.  AEHIP INDIVIDUAL HEALTHY INDIANA PLAN 07/31/07 07:23 COUNTY: >> CASE: >>>>>>>>>> CAT/SEQ: >>>>>>> DNT048 T SYST/DUCKE LAST ACTIVITY DATE: >>>>>>>> XREF NBR FIRST MI LAST NAME SUF DOB SEX RACE RID CASE 02 FATHER ONLY 01/01/60 M W 300065423099 >>>>>>>>>> DOES INDIVIDUAL CURRENTLY HAVE INSURANCE COVERAGE? (Y/N/?) _ VR: __ INDIVIDUAL'S INSURANCE LAST END DATE: ________ VR: __ ACCESS TO EMPLOYER'S SPONSORED HEALTH INSURANCE? (Y/N/?): _ VR: __ DID INDIVIDUAL ANSWER "YES" TO A HEALTH SCREENING QUESTION? (Y/N): __ FOR CONDITIONALLY APPROVED APPLICANT DATE OF FIRST PAYMENT: OR NON-PAYMENT NOTIFICATION DATE: FOR RECIPIENT DATE OF NOTIFICATION OF FAILURE TO PAY POWER ACCOUNT: ________ RECALCULATE HIP? (Y/N): _ QUALIFYING EVENT TYPE CODE: __ LAST RE-CALCULATED DATE: ________ HIP EVENT: __ PF19:PREV INDIVIDUAL PF20:NEXT INDIVIDUAL PF23-PF24: HISTORY
7.	Access AEWAA to confirm the Assistance Group status for the AG listed on AEHIP has changed to OPEN.  AEWAA ASSISTANCE GROUP AUTHORIZATION 12/12/07 12:56 COUNTY: 27 CASE: 2000085338 WORKER: T49701 L REFM/STEIN LAST ACTIVITY DATE: 12/12/07 STATUS: OPEN REDETERMINATION MONTH: 102008 BUDGET ELIG MONTHLY AG EFFECTIVE CAT SEQ RE PAYEE STAT AMOUNT STAT ***REASON CODES**** DATE AUTHOR MAHN 01 _ H CASEO PASS 80.00 OPEN 277 __ __ __ __ 01012008 ______

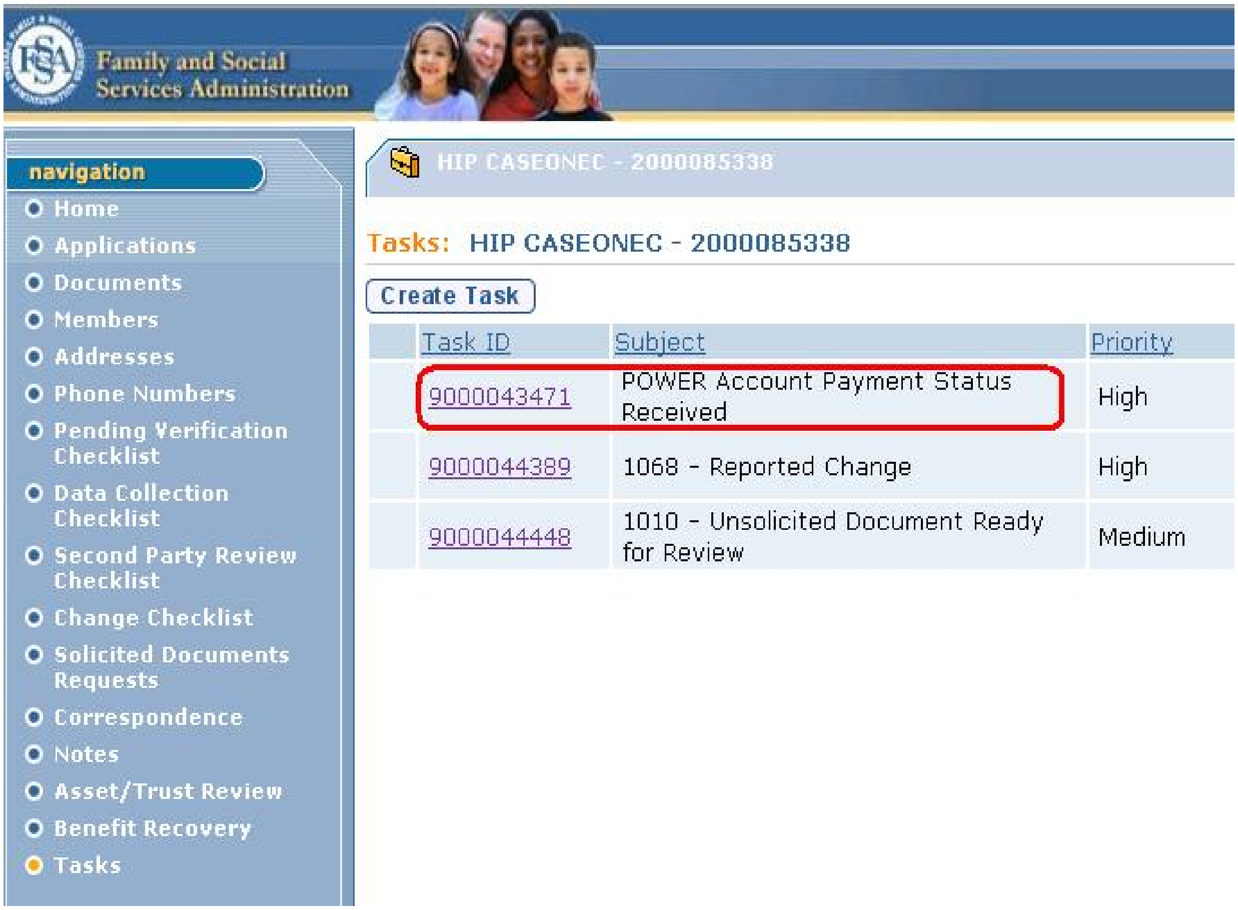
Step	Change Resulting from Power Plan Payment Notification
8.	In ICES, enter Running Record Comments on the ICES CLRC screen: • In NEXT TRAN: enter “CLRC”. • In PARMS: enter the ICES Case Number and press **Enter**.  • Or if currently in the ICES case, use **PF4** to get to CLRC.
9.	The Running Record Comments display. ✓ Under the COMMENTS section, update with the information received on the POWER Account Payment Status form and any action taken related to the reported change. ✓ After the comments are added, press **Enter.** 
10.	The following question displays:  • When the comments entered are correct and ready to be added to the case record, press “Y” for yes. • If the information ought not to be added to the case record, press “N” for no. However, since this is a new change, “N” is not selected at this time.

Step	Change Resulting from Power Plan Payment Notification
11.	The task is complete. To close the task: • Click *Home* in the Left Navigation bar to return to the WFMS Case Home page.



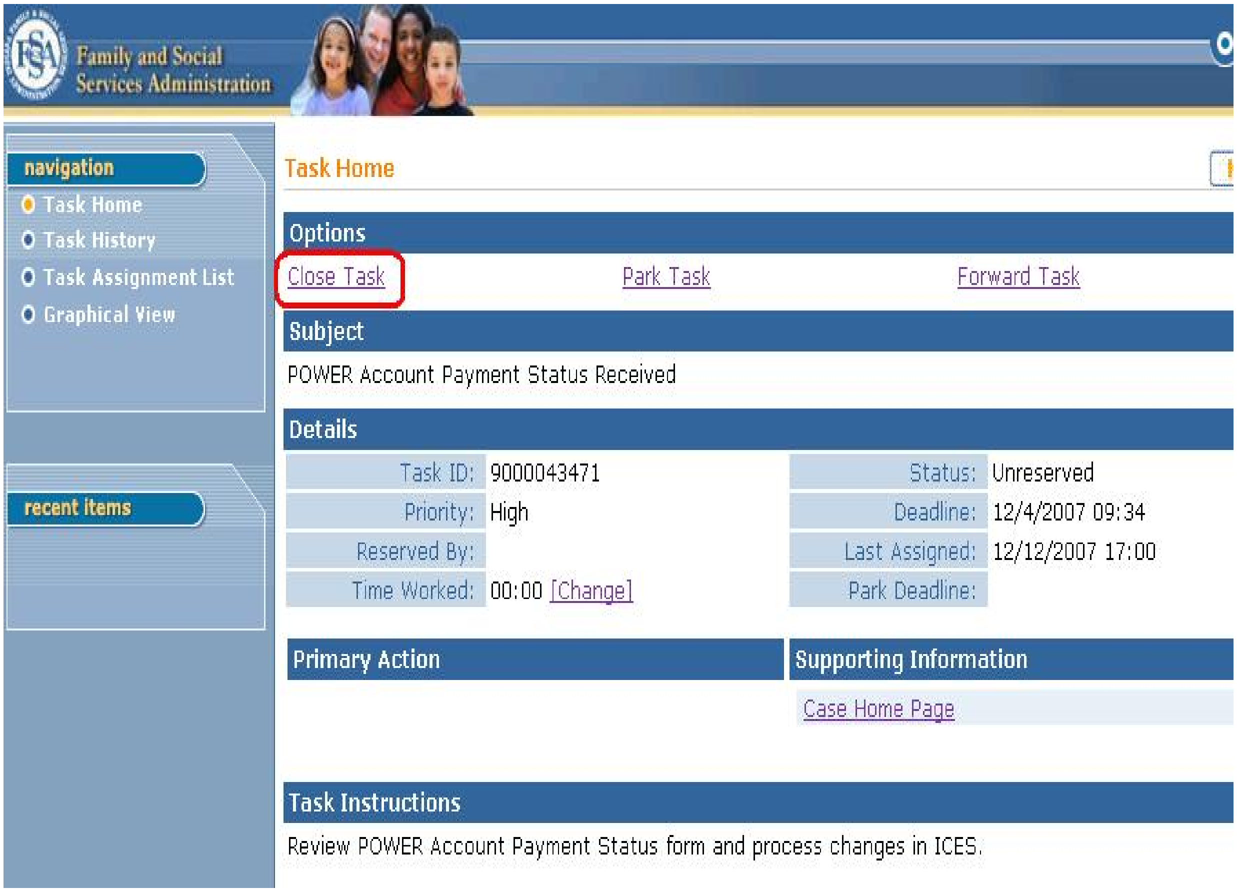
Step	Change Resulting from Power Plan Payment Notification
12.	On the Case Home page, click *Tasks* from the Left Navigation bar to go to the Task Home Page. 

<table>
<tr><th>Step</th><th>Change Resulting from Power Plan Payment Notification</th></tr>
<tr><td>13.</td><td>On the Tasks page, select the HIP Power Account Payment Status Received Task that you have been working on.



</td></tr>
</table>

<table>
<tr><th>Step</th><th>Change Resulting from Power Plan Payment Notification</th></tr>
<tr><td>14.</td><td>Click Close Task from the Task Home Page.

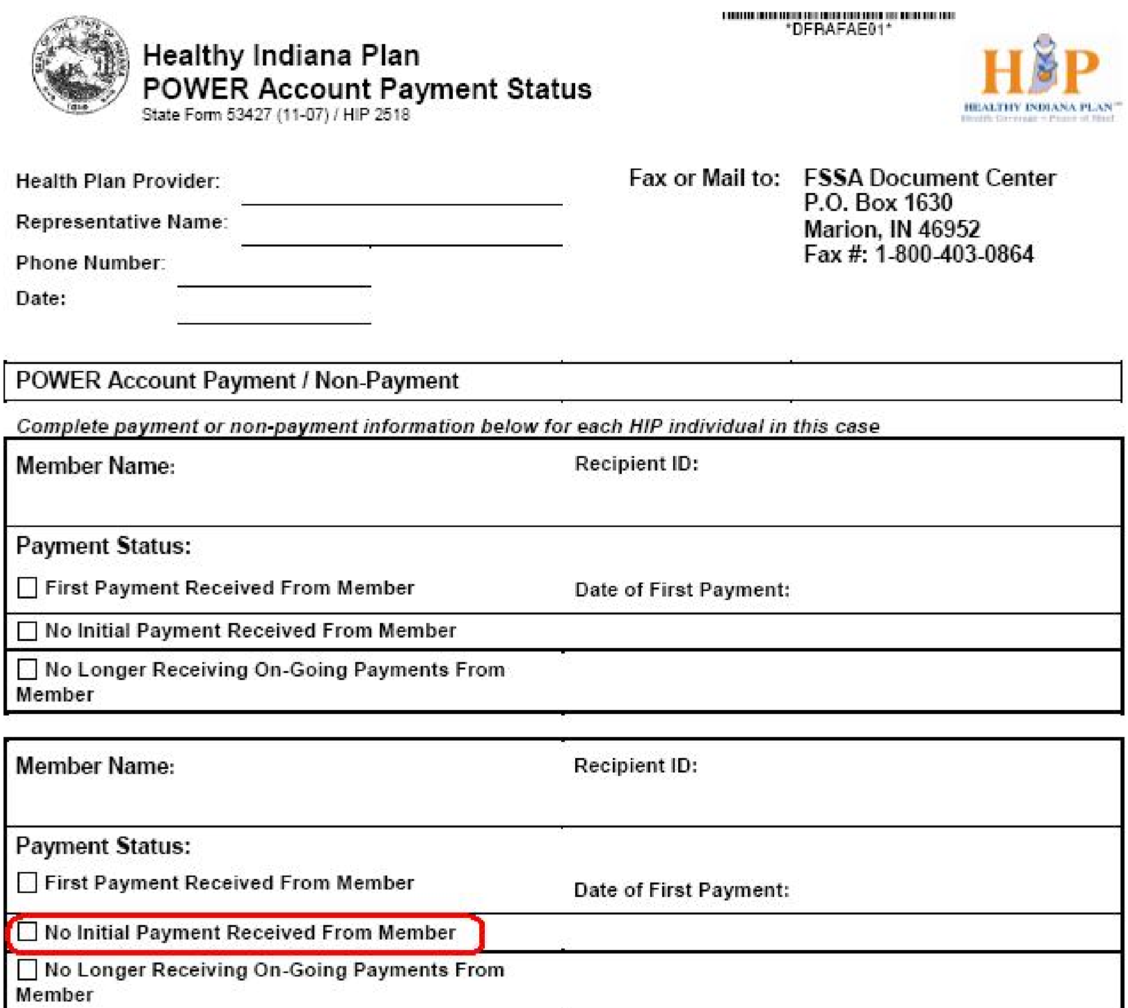


If it is necessary to Park or Forward the Task, refer to Section 3.11.1 Creating, Parking, Forwarding, Getting and Opening Tasks.<insert hyperlink>.</td></tr>
</table>

8.5.3.2 Health Plan Reports Conditionally Approved HIP Applicant Has Not Paid POWER Account Contribution

When the HIP Client does not pay their initial account contribution, the health plans will send the Power Account Payment Status form by mail or fax. The document is scanned by the Document Center and becomes a POWER Account Payment Status Received task for HIP WG 3.

<table>
<tr><th>Step</th><th>Change Resulting from Power Plan Non-Payment Notification for Conditionally Approved HIP Applicant</th></tr>
<tr><td>1.</td><td>Refer to Section 8.5.3.1, Health Plan Reports HIP Recipient Has Paid POWER Account Contribution, Steps 1 – 3. <insert hyperlink ></td></tr>
<tr><td>2.</td><td>Review the case name and number on the POWER Account Payment Status form received from the plan to confirm these match the WFMS case associated with the task being worked. For non-payment, the health plan will check the box next to No Initial Payment Received From Member.


DFRAFAE01
Healthy Indiana Plan
POWER Account Payment Status
State Form 53427 (11-07) / HIP 2518

Health Plan Provider:
Representative Name:
Phone Number:
Date:

Fax or Mail to: FSSA Document Center
P.O. Box 1630
Marion, IN 46952
Fax #: 1-800-403-0864

POWER Account Payment / Non-Payment
Complete payment or non-payment information below for each HIP individual in this case

Member Name: Recipient ID:
Payment Status:
☐ First Payment Received From Member Date of First Payment:
☐ No Initial Payment Received From Member
☐ No Longer Receiving On-Going Payments From Member

Member Name: Recipient ID:
Payment Status:
☐ First Payment Received From Member Date of First Payment:
☐ No Initial Payment Received From Member
☐ No Longer Receiving On-Going Payments From Member</td></tr>
</table>

Step	Change Resulting from Power Plan Non-Payment Notification for Conditionally Approved HIP Applicant
3.	In ICES, access AEHIP for the ICES Case Number listed as the Case ID in WFMS. Enter the date of the POWER Account Payment Status form in the NON-PAYMENT NOTIFICATION DATE field. • This entry will change the AG status on AEWAA from COND to DENY.

```
AEHIP              INDIVIDUAL HEALTHY INDIANA PLAN          07/31/07 07:23
COUNTY: >>   CASE: >>>>>>>>>> CAT/SEQ: >>>>>>>          DNT048 T SYST/DUCKE
LAST ACTIVITY DATE: >>>>>>>>
                                                                   XREF
NBR FIRST      MI LAST NAME  SUF   DOB        SEX RACE     RID           CASE
02  FATHER        ONLY             01/01/60    M   W   300065423099  >>>>>>>>>>

DOES INDIVIDUAL CURRENTLY HAVE INSURANCE COVERAGE? (Y/N/?) _   VR: __
INDIVIDUAL'S INSURANCE LAST END DATE: ________   VR: __
ACCESS TO EMPLOYER'S SPONSORED HEALTH INSURANCE? (Y/N/?): _    VR: __
DID INDIVIDUAL ANSWER "YES" TO A HEALTH SCREENING QUESTION?  (Y/N): __
--------------------------------------------------------------------------------
                    FOR CONDITIONALLY APPROVED APPLICANT
DATE OF FIRST PAYMENT: __________ OR NON-PAYMENT NOTIFICATION DATE: ________
                              FOR RECIPIENT
DATE OF NOTIFICATION OF FAILURE TO PAY POWER ACCOUNT: ________
--------------------------------------------------------------------------------

RECALCULATE HIP? (Y/N): _       QUALIFYING EVENT TYPE CODE: __
LAST RE-CALCULATED DATE: ________                HIP EVENT: __

PF19:PREV INDIVIDUAL        PF20:NEXT INDIVIDUAL         PF23-PF24: HISTORY
```

Step	Change Resulting from Power Plan Non-Payment Notification for Conditionally Approved HIP Applicant

4.	Access AEWAA History screen by entering AEWAA in the Next Tran field and the case number/date in the PARMS.
	`NEXT TRAN: aewaa___ PARMS: 2000087508/12112007_`
	
	AEWAA History screen will show case status as DENY.
	`AEWAA ASSISTANCE GROUP AUTHORIZATION 12/11/07 13:`
	`COUNTY: 27 CASE: 2000087508 WORKER: T49701 L REF`
	`LAST ACTIVITY DATE: 12/11/07 STATUS: OPEN`
	`REDETERMINATION MONTH: 112008 BUDGET`
	`ELIG MONTHLY AG EFFECTIVE`
	`CAT SEQ RE PAYEE STAT AMOUNT STAT ***REASON CODES**** DATE`
	`MAHN 01 _ S SPADE FAIL .00 DENY 276 ___ ___ ___ ___ 01012008`

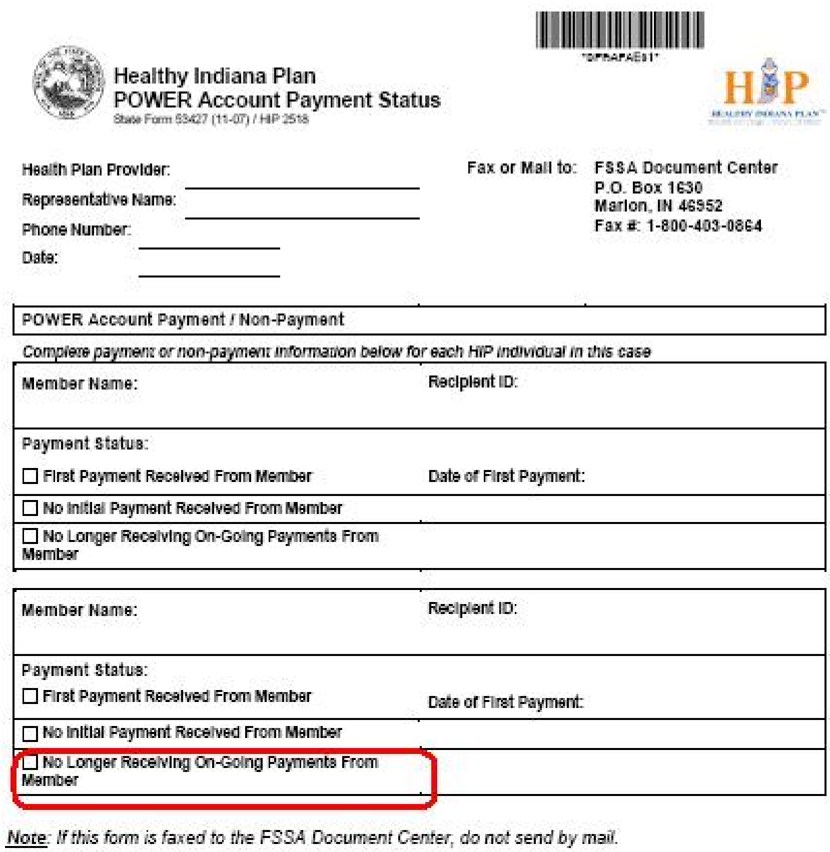
5.	In ICES, enter Running Record Comments on the ICES CLRC screen: • In NEXT TRAN: enter "CLRC". • In PARMS: enter the ICES Case Number and press **Enter**. `NEXT TRAN: CLRC____ PARMS: 3000353437__` • Or if currently in the ICES case, use **PF4** to get to CLRC.
6.	The Running Record Comments display. • Under the COMMENTS section, update with the information received on the POWER Account Payment Status form and any action taken related to the reported change. • After the comments are added, press **Enter.** .
7.	The following question displays: `Do you want to update this (Y/N)? : Y` • When the comments entered are correct and ready to be added to the case record, press "Y" for yes. • If the information ought not to be added to the case record, press "N" for no. However, since this is a new change, "N" is not selected at this time.

Step	Change Resulting from Power Plan Non-Payment Notification for Conditionally Approved HIP Applicant
8.	Refer to Section 8.5.3.1 Health Plan Reports HIP Recipient Has Paid Power Account Contribution step 11 to close the task. <insert hyperlink>

8.5.3.3 Health Plan Reports Change Due to Eligible HIP Recipient Non-Payment of POWER Account Contribution

When an eligible HIP recipient does not pay their POWER Account contribution, the health plans will send the Power Account Payment Status form by mail or fax. The document is scanned by the Document Center and becomes a POWER Account Payment Status Received task for HIP WG 3.

<table>
<tr><th>Step</th><th>Change Resulting from Eligible HIP Recipient POWER Plan Non Payment Notification</th></tr>
<tr><td>1.</td><td>Refer to Section 8.5.3.1, Health Plan Reports HIP Recipient Has Paid POWER Account Contribution, Steps 1 – 3 <insert hyperlink ></td></tr>
<tr><td>2.</td><td>Review the case name and number on the POWER Account Payment Status form received from the plan to confirm these match the WFMS case associated with the task being worked. The plan will check No Longer Receiving On-Going Payments From Member.



Healthy Indiana Plan
POWER Account Payment Status
State Form 53427 (11-07) / HIP 2518

Health Plan Provider:
Representative Name:
Phone Number:
Date:

Fax or Mail to: FSSA Document Center
P.O. Box 1630
Marion, IN 46952
Fax #: 1-800-403-0864

POWER Account Payment / Non-Payment

Complete payment or non-payment information below for each HIP individual in this case

Member Name: Recipient ID:
Payment Status:
☐ First Payment Received From Member Date of First Payment:
☐ No Initial Payment Received From Member
☐ No Longer Receiving On-Going Payments From Member

Member Name: Recipient ID:
Payment Status:
☐ First Payment Received From Member Date of First Payment:
☐ No Initial Payment Received From Member
☐ No Longer Receiving On-Going Payments From Member

Note: If this form is faxed to the FSSA Document Center, do not send by mail.</td></tr>
<tr><td>3.</td><td>In ICES access AEHIP for the ICES Case Number listed as the Case ID in WFMS. Enter the date of the POWER Account Payment Status form in the DATE OF NOTIFICATION OF FAILURE TO PAY POWER ACCOUNT field.

- This entry will change the AG status on AEWAA from OPEN to DENY.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Change Resulting from Eligible HIP Recipient POWER Plan Non Payment Notification</th></tr>
<tr><td></td><td>AEHIP INDIVIDUAL HEALTHY INDIANA PLAN 07/31/07 07:23
COUNTY: >> CASE: >>>>>>>>>> CAT/SEQ: >>>>>>> DNT048 T SYST/DUCKE
LAST ACTIVITY DATE: >>>>>>>>
XREF
NBR FIRST MI LAST NAME SUF DOB SEX RACE RID CASE
02 FATHER ONLY 01/01/60 M W 300065423099 >>>>>>>>>>
DOES INDIVIDUAL CURRENTLY HAVE INSURANCE COVERAGE? (Y/N/?) _ VR: __
INDIVIDUAL'S INSURANCE LAST END DATE: ________ VR: __
ACCESS TO EMPLOYER'S SPONSORED HEALTH INSURANCE? (Y/N/?): _ VR: __
DID INDIVIDUAL ANSWER "YES" TO A HEALTH SCREENING QUESTION? (Y/N): __

FOR CONDITIONALLY APPROVED APPLICANT
DATE OF FIRST PAYMENT: ________ OR NON-PAYMENT NOTIFICATION DATE: ________
FOR RECIPIENT
DATE OF NOTIFICATION OF FAILURE TO PAY POWER ACCOUNT: ________

RECALCULATE HIP? (Y/N): _ QUALIFYING EVENT TYPE CODE: __
LAST RE-CALCULATED DATE: ________ HIP EVENT: __
PF19:PREV INDIVIDUAL PF20:NEXT INDIVIDUAL PF23-PF24: HISTORY</td></tr>
<tr><td>4.</td><td>Enter Running Record Comments on the ICES CLRC screen:
• In NEXT TRAN, enter “CLRC”.
• In PARMS, enter the ICES Case Number and press Enter.
NEXT TRAN: CLRC____ PARMS: 3000353437__
• Or if currently in the ICES case, press PF4 to automatically go to CLRC.</td></tr>
<tr><td>5.</td><td>The following question displays:
Do you want to update this (Y/N)? : Y
• If the comments entered are correct and need to be added to the case record, press “Y” for yes.
• If the information ought not to be added to the case record, press “N” for no.</td></tr>
<tr><td>6.</td><td>Refer to Section 8.5.3.1 Health Plan Reports HIP Recipient Has Paid Power Account Contribution, step 11 to close the task and receive the next task. <insert hyperlink></td></tr>
</table>

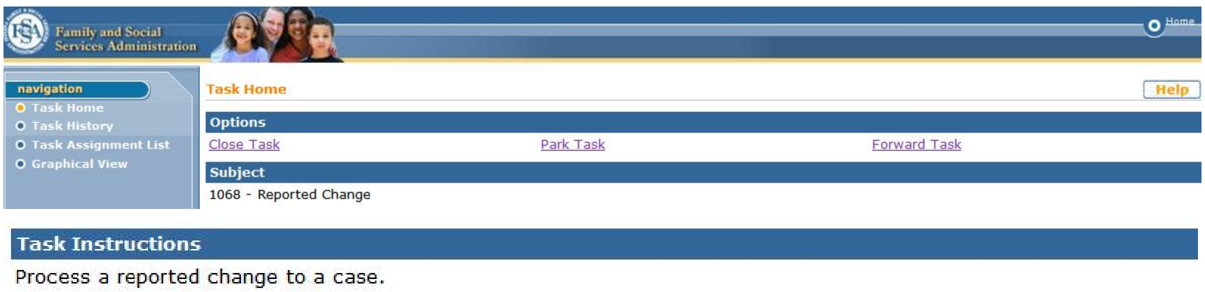
8.5.3.4 Change Reported to Call Center during Business Hours

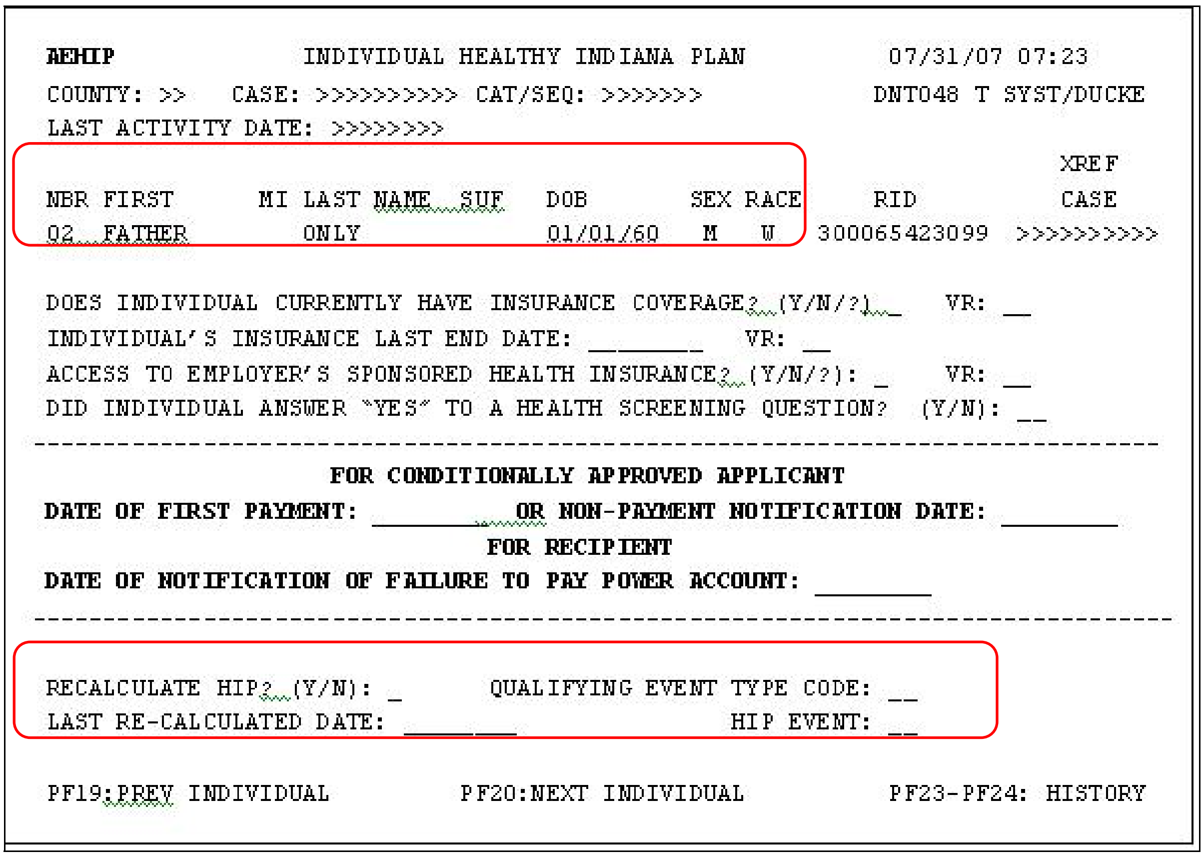
These instructions are general and apply to the examples included and to any change received as a task in the WFMS and processed in ICES.

Step	Change Reported to Call Center During Business Hours
1.	Refer to Section 8.1, Call Routing and Authentication WI <insert hyperlink>
2.	Ask for and note caller's first and last name and last 4 digits of SSN and Case Number or DOB. Check that these match information on the screen.
3.	If the caller cannot be authenticated, take the change information without releasing any information to the caller. • If the caller has a HIP case, create a task from within the case for HIP WG 3 to handle the change reported. Refer to Section 2.13, Responding to Calls by Type <insert hyperlink>. • If the caller does not have a HIP case, create a task for WG 3 to handle the change reported. • Skip to Step 6.
4.	If the caller can be authenticated, determine if the change is one that you can process completely and quickly over the phone or if significant additional processing time is required after the initial change information is taken. This determination is based on the type of change and the call volume. • If the change can be processed while the caller is on the phone, go to Step 5. **Note**: For HIP, due primarily to the need to determine POWER Account recalculation status for many reported changes, those that can be processed quickly are typically address changes and recipient requests to close their case. • If unable to process the change quickly during the telephone call and/or the change need to be processed by another workgroup, skip to Step 6.
5.	If you are able to continue processing the change, refer to Section 8.5.3.5, Processing a Change Received from the Call Center, Steps 4 – ~~15~~ 16<insert hyperlink>.
6.	If the change has not been processed during the telephone call, create a Reported Change task for HIP WG3. From within the HIP case, click *Tasks* from the left Navigation bar.  • The WFMS displays the Tasks page.
7.	Click *Create Task*. • The WFMS displays the Select Task Type page.
8.	Use the work instructions for creating a task in Section 3.11.1 Common Processes <insert hyperlink> and create a Reported Change task for HIP WG 3.

8.5.3.5 Processing a Change Received from the Call Center

Once the task has been created for HIP WG 3 related to the change that was reported to the Call Center, the Reported Change task needs to be completed.

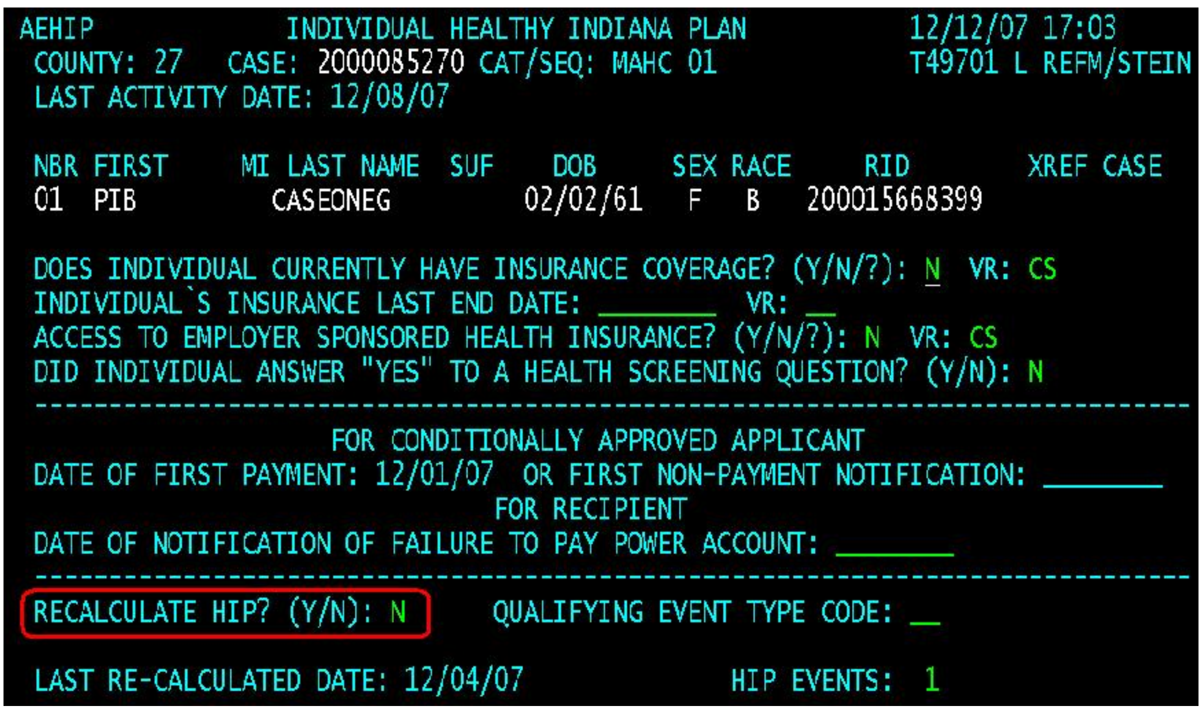
Step	Processing a Change Received from the Call Center
1.	From the Task Home page retrieve the task. Review the task information including the Subject, Details, and Task Instructions.
2.	The Subject lists the type of task that was received. In this case, the task is listed as *Reported Change* and the instructions are *Process a reported change to a case.* 
3.	Review the notes in ICES from CLRC. • To access the ICES case record notes: ✓ In the NEXT TRAN field, use "CLRC". ✓ In the PARMS field, use the ICES Case Number/Date reviewing the case record comments.  The most recent comments show in CLRC.  Determine if the change reported is related to the recalculation of a POWER account or one that impacts HIP eligibility (e.g. AG closure). If the change is related to a potential recalculation of the POWER account, go to Step 4. If the change is related to eligibility, refer to 8.5.3.11 Processing a Change Resulting in HIP Ineligibility <insert hyperlink>. If the recipient is receiving any other program benefits in addition to HIP and the change would affect the non-HIP case, create a Reported Change task from within the non-HIP

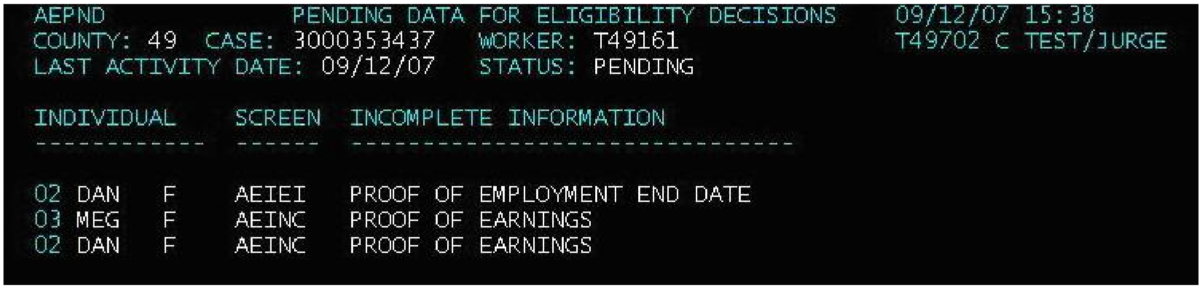
Step	Processing a Change Received from the Call Center
	standard case to be processed by (non-HIP) Changes WG3.
4.	Determine if the caller requested a recalculation of their POWER Account contribution. • Access AEHIP for the recipient affected by the reported change. If the individual listed is not the recipient affected by the change, use **PF19** or **PF20** to locate the HIP recipient affected by the reported change. • If the recipient is not requesting recalculation of their POWER Account contribution, enter N in the RECALCULATE HIP? field. Then skip to Steps 7 and 8 in this section. • If the recipient is requesting recalculation, go to Step 5. Note: a payment must have been made and the case must be in Open status for a recalculation request to be processed.  AEHIP INDIVIDUAL HEALTHY INDIANA PLAN 07/31/07 07:23 COUNTY: >> CASE: >>>>>>>>>> CAT/SEQ: >>>>>>> DNT048 T SYST/DUCKE LAST ACTIVITY DATE: >>>>>>>> XREF NBR FIRST MI LAST NAME SUF DOB SEX RACE RID CASE 02 FATHER ONLY 01/01/60 M W 300065423099 >>>>>>>>>> DOES INDIVIDUAL CURRENTLY HAVE INSURANCE COVERAGE? (Y/N/?) _ VR: __ INDIVIDUAL'S INSURANCE LAST END DATE: ________ VR: __ ACCESS TO EMPLOYER'S SPONSORED HEALTH INSURANCE? (Y/N/?): _ VR: __ DID INDIVIDUAL ANSWER "YES" TO A HEALTH SCREENING QUESTION? (Y/N): __ FOR CONDITIONALLY APPROVED APPLICANT DATE OF FIRST PAYMENT: ________ OR NON-PAYMENT NOTIFICATION DATE: ________ FOR RECIPIENT DATE OF NOTIFICATION OF FAILURE TO PAY POWER ACCOUNT: ________ RECALCULATE HIP? (Y/N): _ QUALIFYING EVENT TYPE CODE: __ LAST RE-CALCULATED DATE: ________ HIP EVENT: __ PF19:PREV INDIVIDUAL PF20:NEXT INDIVIDUAL PF23-PF24: HISTORY
5.	If the recipient is requesting recalculation of their POWER account contribution, review the RE-CALCULATED Date field and HIP EVENT field to determine if the individual's POWER account has been recalculated previously and if so, when. . **Note**: LAST RE-CALCULATED DATE is a protected field and is system entered when AEABC is authorized following a recalculation of the POWER account contribution. • Based on program policy and defined scope, enter Y or N in the Recalculate HIP field on AEHIP.

<table>
<tr><th>Step</th><th>Processing a Change Received from the Call Center</th></tr>
<tr><td>6.</td><td>When Y is entered in the RECALCULATE HIP field, you must complete the QUALIFYING EVENT TYPE CODE field.

Use field level help to determine the correct code base on the change reported.
Complete the HIP EVENT field with the current count of recalculations processed for this recipient. If this field was blank prior to the current recalculation, enter 01; if the field contained 01 prior to this recalculation, enter 02.
</td></tr>
<tr><td>7.</td><td>Based on the information from the ICES case record comments on CLRC, use the information provided by the Client to update all the ICES screens associated with the change that is reported.</td></tr>
<tr><td>8.</td><td>When updating the ICES screens, identify missing or incomplete information in ICES with question marks.

If you enter N in the RECALCULATE HIP field on AEHIP, skip to Step 12 of this Section.


</td></tr>
</table>

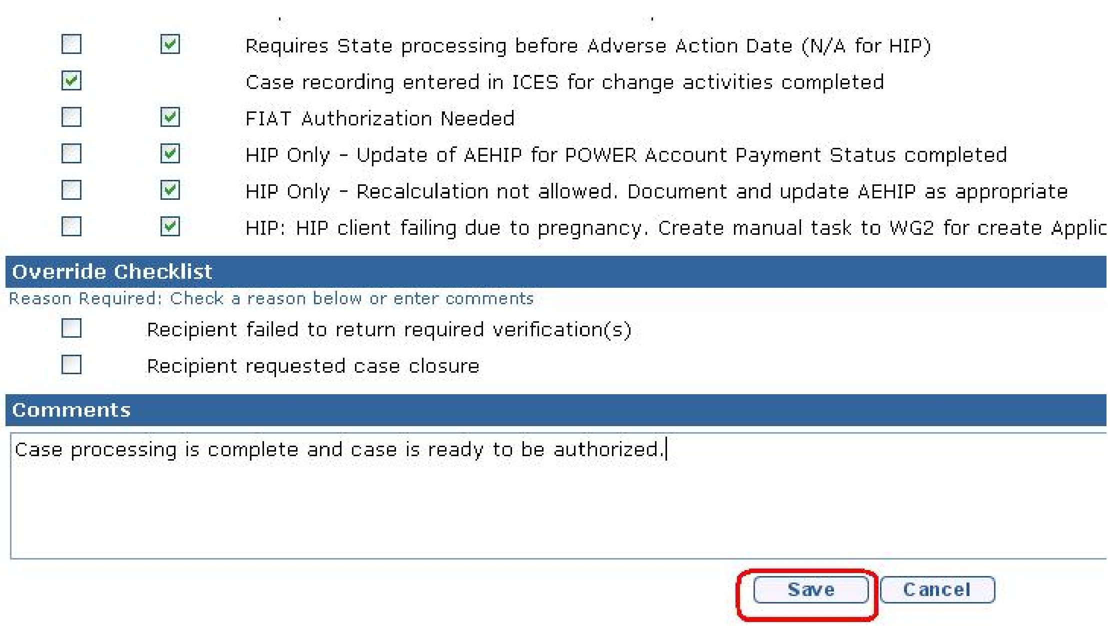
Step	Processing a Change Received from the Call Center
9.	After updating the ICES screens with the information and verifications from the reported change, run AEABC and review AEPND to determine what information is needed to finish processing the change to the case. 
10.	In WFMS under the Case Home page, select *Pending Verifications Checklist* from the left Navigation bar. 

Step	Processing a Change Received from the Call Center
11.	• On the Pending Verifications Checklist, select the information needed to finish processing the Reported Change task and for whom the information is needed. • Follow the steps in the Send Notice Work Instructions to send an FI 2032 – Pending Verifications for Applicants/Recipients to the Client. Refer to Section 3.11.4, Sending Notices <insert hyperlink>. **PENDING VERIFICATIONS FOR APPLICANTS / RECIPIENTS** State Form 42940 (R7 / 11-05) / FI 2032 **DATE:** 9/12/2007 **TO:** no data **YOUR DEADLINE FOR SUBMITTING THIS INFORMATION IS:** no data Case Name no data Case number no data **MAIL OR FAX YOUR INFORMATION TO:** FSSA Document Center P.O.Box 1810 Marion, Indiana 46952 Fax#: 1-800-403-0864 Each box checked below indicates information which is needed to determine your eligibility for Temporary Assistance to Needy Families (TANF), Medicaid / Hoosier Healthwise and Food Stamps. If you do not have the exact papers listed below, you may send/bring in others that provide the same information. You must submit the requested papers by the above deadline or your benefits will be denied or discontinued. **We have enclosed a Document Cover Sheet**. It is important that you include a copy of this Document Cover Sheet with any information you send; it will help us process your case faster. Also, please write your name and Social Security Number on all of the copies you send. If you have questions, contact FSSA at 1-800-403-0864 Monday through Friday 7:00 AM – 7:00 PM. If you prefer to drop off your information at an FSSA local office you may contact the number above to receive address information for an office near you. **Proof of:** / **For:** **Age** – Birth certificate, baptismal, medical and school records, military records, court records / no data **US Citizenship** – Birth certificate, Immigration and Naturalization Service records, baptismal, medical and school records, military records, court records / no data

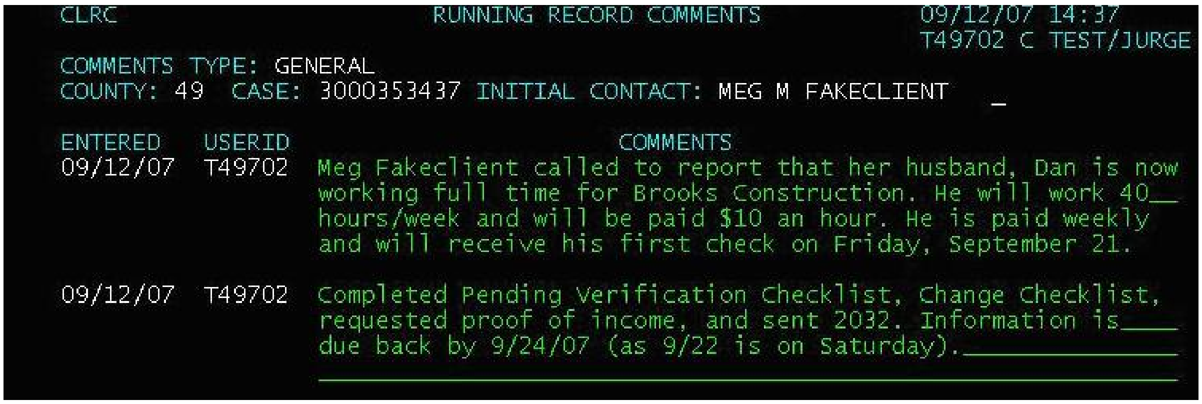
<table>
<tr><th>Step</th><th>Processing a Change Received from the Call Center</th></tr>
<tr><td>12.</td><td>

Return to the Case Home page, and from the left Navigation bar, select *Change Checklist.* Complete as much as possible on the list to indicate what actions have been taken to process the change.

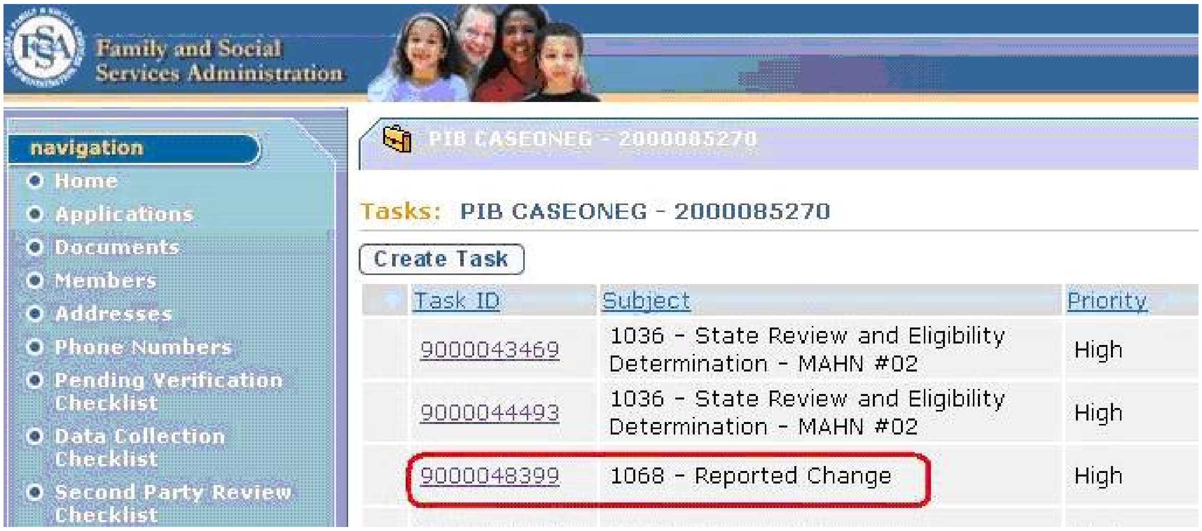
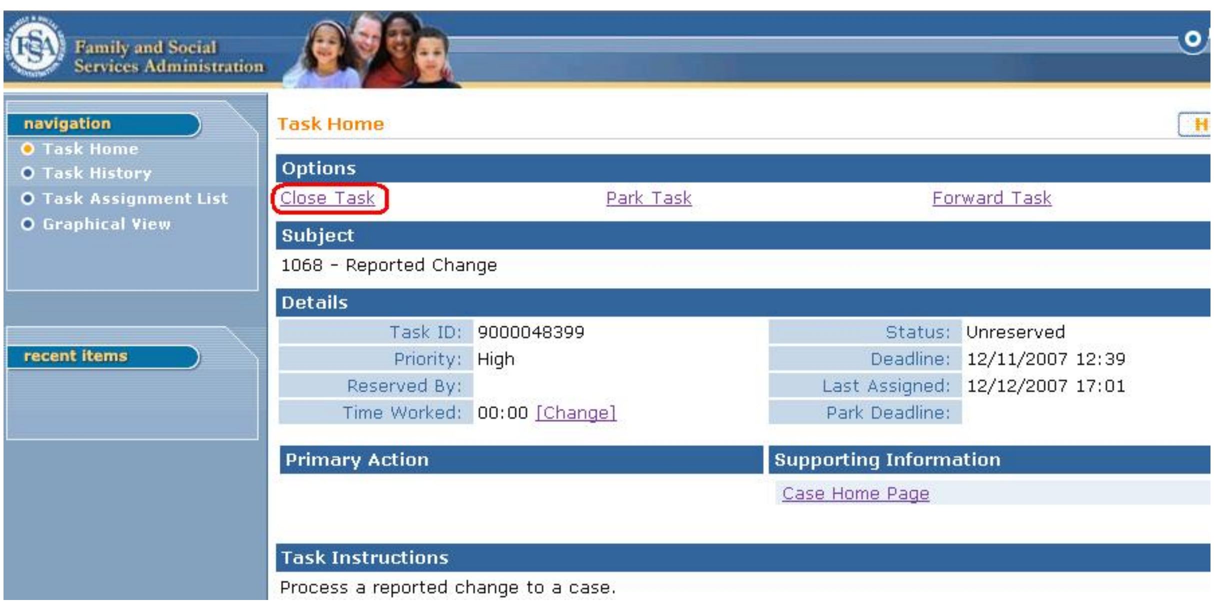
If no verification has been requested or when requested verification has been received, it will be necessary to complete the checklist. The completion of the checklist and clicking on Save initiates a Ready for Review of Eligibility Determination task for an SEC.



</td></tr>
</table>

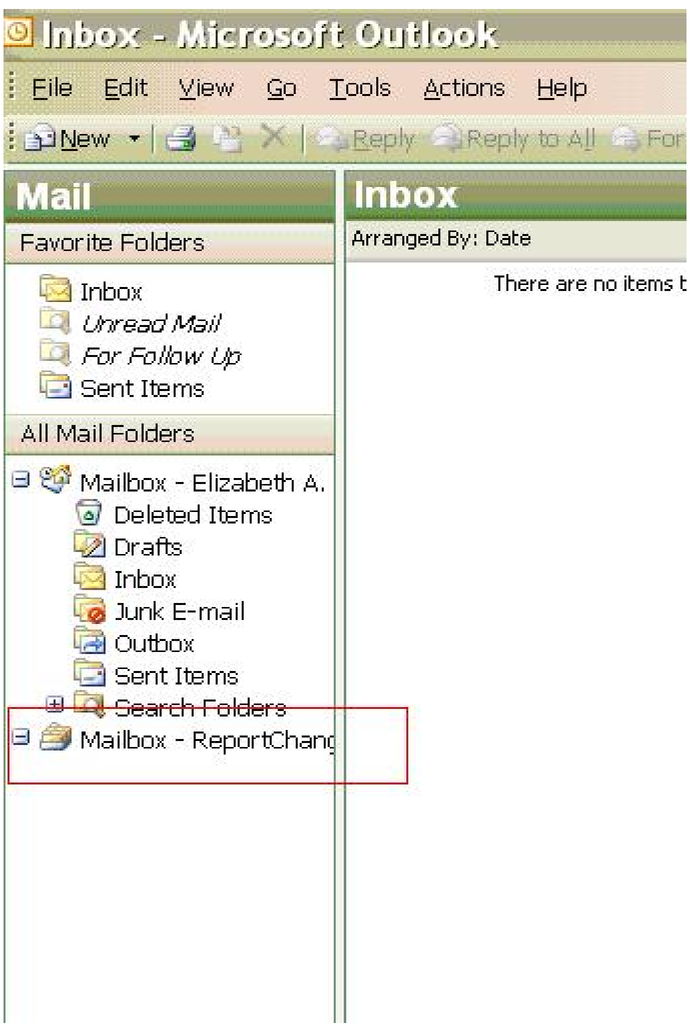
Step	Processing a Change Received from the Call Center
13.	In ICES, enter Running Record Comments on the ICES CLRC screen: • In NEXT TRAN: enter "CLRC". • In PARMS: enter the ICES Case Number and press **Enter**.  Or if currently in the ICES case, use **PF4** to get to CLRC.
14.	The Running Record Comments display.  Under the COMMENTS section, update with the information the Client has provided. When CLRC is updated due to a reported change, the following types of information must be included: • Name of individual reporting the change; • The name of the individual the change is for; • The reason for the change; • The type of change; • Any pending information that is needed to process the case; • When the pending information was requested; • When the pending information is due back; • All actions that have been taken in regards to the reported change. After the comments are added, press **Enter**.
15.	The following question displays:  • When the comments entered are correct and ready to be added to the case record, press "Y" for yes. • If the information ought not to be added to the case record, press "N" for no. However, since this is a new change, "N" is not selected at this time.

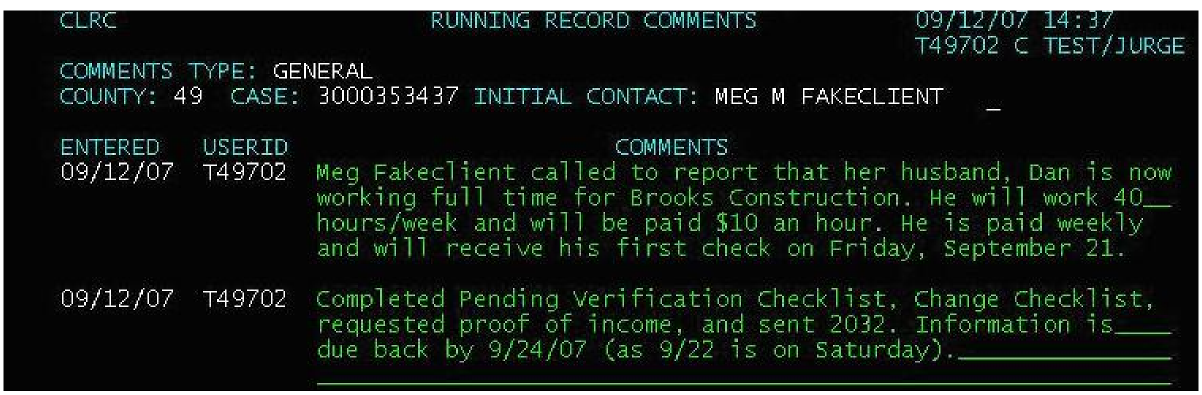
Step	Processing a Change Received from the Call Center
16.	The task is now complete. Return to the Case Home page and click Tasks to display the Task Home Page.

Step	Processing a Change Received from the Call Center
17.	From the Task list, review the task. If you created a Ready for State Review and Eligibility Determination task for SEC, or a Reported Change task for WG3, the task will display on the Tasks page. Select the Reported Change Task.  Click the Task ID, which will display the Task Home page. Click Close Task under the Options selection if you are ready to close the task. Refer to Section 3.11.1 Creating, Parking, Forwarding,, Getting and Opening Tasks if you need to Park or Forward the task. <insert hyperlink> 

8.5.3.6 Change Reported to Call Center after Business Hours

When the Call Center is closed, the IVR system provides self-service option for a caller to leave a message to report changes. The caller is routed to a message asking her to select the type of change she is reporting and to provide her name, Case Number, telephone number, and the change information. Designated agents in HIP WG 3 retrieve messages each business day in the morning and create tasks to process the change reports. The designated agents retrieve the messages, listen to them via headsets connected to their computers, and create the tasks.

Step	Client reports change to call center after business hours.
1.	Retrieve voice mail message from the Change Reporting Mailbox. To retrieve voice mail messages from the Change Reporting Mailbox, user(s) authorized by Service Center managers double-click the Outlook icon on the desktop. Click Mailbox-Report Change. The messages display as email in the inbox. Note: as a backup method for retrieving voice mail messages, Call Center managers may instruct designated users to dial an internal voice mail number, extension and password. In both methods, the designated user listens to the message and creates a Reported Change task. 

Step	**Client reports change to call center after business hours.**
2.	Open WFMS and display it on the right monitor. Also open ICES. This allows you to move through each change message in Outlook, document it in ICES, and enter it as a task in WFMS.
3.	Double-click the first highlighted message in the Outlook Report Change mailbox.
4.	View the .wav file in the body of the email. Double-click the file name to play the message. Listen carefully to the message and capture all of the information provided.
5..	Based on the information (and possibly a case search to identify AGs within the case or to locate the Case Number), create a Reported Change task for HIP WG 3 if the caller has a HIP case. If the caller has a case for benefits other than HIP, from within that case, go to Tasks under Left Navigation to create a Reported Change task for WG 3. Use the work instructions for creating a task in Section 3.11.1, Creating, Parking, Forwarding, Getting and Opening Tasks <insert hyperlink>.
6.	In ICES, update the case record comments based on the information left on the IVR voice mail system. To enter Running Record Comments on the ICES CLRC screen: ✓ In NEXT TRAN, enter "CLRC". ✓ In PARMS, enter the ICES Case Number and press **Enter**.  Or if currently in the ICES case, use **PF4** to automatically go to CLRC.
7.	The Running Record Comments display.  Under the COMMENTS section, update with all of the information the Client provided in the change message left after business hours: ✓ Name of individual reporting the change; ✓ The name of the individual the change is for; ✓ The type of change; ✓ The daytime phone number where the person can be contacted After all comments are added, press **Enter**.

Step	**Client reports change to call center after business hours.**
8.	The following question displays:  If the comments entered are correct and need to be added to the case record, press “Y” for yes. If the information should not be added to the case record, press “N” for no. However, since this is a new change, “N” should not be selected at this time.
9.	After updating the case record comments in ICES, create a task for the appropriate workgroup. Refer to Section 3.11.1, Creating, Parking, Forwarding, Getting, and Opening Task <insert hyperlink> for creating a Task.
10.	Close the Media Player software screen. Click the “Delete” button on your Outlook e-mail box and go to the next message.
11.	Repeat Steps 3-10 for each message.

8.5.3.7 Change Reported by Fax or Mail

Changes reported by fax or mail from a Client, applicant, authorized representative or a third party for a HIP case include the Report of Change-Healthy Indiana Plan, the Healthy Indiana Plan POWER Account Payment Status form or some other written document from a HIP recipient to report a change. The document is scanned by the Document Center and becomes a task for the ES in HIP WG 3. If the document is not indexed, then it is routed to the HIP Non-Indexed Document work queue and processed by HIP WG 8. These tasks may also go to the "general" Non-Indexed Document work queue. After indexing the document, the EA forwards the change document to the ES in HIP WG 3. If the EA in the HIP WG 8 determines the document should be indexed to a non-HIP case, she will complete the indexing and forward the task to the appropriate non-HIP work queue.

Procedures for processing the Healthy Indiana Plan POWER Account Payment Status form are contained in Section 8.5.3.1, Health Plan Reports HIP Recipient Has Paid POWER Account Contribution <insert hyperlink>, Section 8.5.3.2, Health Plan Reports Conditionally Approved HIP Applicant Has Not Paid POWER Account Contribution <insert hyperlink>, and Section 8.5.3.3, Health Plan Reports Change Due to Eligible HIP Recipient Non-Payment of POWER Account Contribution <insert hyperlink>. The following steps are for processing all other changes reported by fax or mail.

Step	Change Reported by Fax or Mail
1.	From the Task Home page in WFMS, retrieve the task. 
2.	The task is displayed as Reported Change. Review the information provided.

<table>
<tr><th>Step</th><th>Change Reported by Fax or Mail</th></tr>
<tr><td>3.</td><td>


- The Subject lists the type of task that was received. The task is listed as Reported Change.

- The Tasks instructions for “Reported Change” are process the reported change.
</td></tr>
<tr><td>4.</td><td>Check to see if there are documents attached to the case based on the change that was reported.</td></tr>
<tr><td>5.</td><td>Click Case Home page link under Supporting Information.

- The next screen to display is the Case Home page.
</td></tr>
<tr><td>6.</td><td>On the Case Home page, click Documents from the left Navigation bar.

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Change Reported by Fax or Mail</th></tr>
<tr><td>7.</td><td>From the Documents Page, review the change report documents that have just been received.
If the change document is a Report of Change-Healthy Indiana Plan, review the information including whether the Client indicates she is requesting a recalculation of her POWER account contribution.
Mail or Fax Completed Form to:
FSSA Document Center
P.O. Box XXXX
Marion, IN XXXXX
Fax #: 1-8XX-XXX-XXXX
Name of case
Case number
Address (number and name, city, state, ZIP code)
Telephone number where you can be reached: ( )
IMPORTANT INFORMATION
Your Social Security number is being requested by this State agency in accordance with 45 CFR 205.52, 7 CFR 273.6, and 42 CFR 435.910. The information obtained on this form is confidential under state and federal regulations, including 470 IAC 1-2-7, 470 IAC 1-3-1, 470 IAC 6-1-1, 405 IAC 1-1-12, 45 CFR 205.50, 7 CFR 272.1(c), and 42 CFR 431.300. This information will not be released except as permitted or required by law or with the consent of the applicant/recipient.
ALL CHANGES MUST BE REPORTED WITHIN 10 DAYS.
1. CHANGE OF ADDRESS
New address (number and street, city, state, ZIP code) | Telephone number ( ) | Date moved
2. CHANGE OF PEOPLE IN YOUR HOUSEHOLD
Name of Person | In | Out | Date of Birth | Social Security Number | Date of Change
3. CHANGE IN SOURCE OR AMOUNT OF EARNED INCOME
This includes new employment, raises, promotions and access to employer sponsored health insurance.
Name or person | Type of change | Does this employer offer Health Insurance? ☐ Yes ☐ No | Date of change
Place of employment | Start date | Hourly wage | Expected weekly hours of work
4. DO YOU WANT US TO RECALCULATE YOUR CONTRIBUTION AMOUNT TO THE HIP COVERAGE? ☐ Yes ☐ No
<u>Note</u>: you are allowed one Recalculation in a 12-month period related to income from the same job or loss of a job.
5. CHANGE IN SOURCE OR AMOUNT OF UNEARNED INCOME
This includes child support, Social Security, SSI, unemployment, VA benefits, utility checks, contributions, financial aid, etc.
Name of person | Type of change | Date of Change
New amount $ | Frequency of amount: ☐ Monthly ☐ Weekly ☐ Other
If Other, Specify:
6. HEALTH INSURANCE: Does anyone in the household have health insurance coverage including Medicare? (Do Not List Medicaid)
Name of Person Covered | Insurance Company | Claim Number, Policy or Group Number | Coverage Start Date
7. PREGNANCY: Is anyone in the household pregnant?
Name of Person | Date of Birth | Social Security Number | Date of Expected Delivery | Number of Babies Expected
8. OTHER CHANGES
9. Do you expect the changes you have reported to continue beyond this month? ☐ Yes ☐ No
If no, please explain:
Signature | Date (month, day, year)
Telephone number where you can be reached: ( ) | Social Security Number</td></tr>
<tr><td>8.</td><td>If the client is requesting a recalculation, refer to Section 8.5.3.5 Processing a Change Received from the Call Center, Steps 4 – 16, <insert hyperlink>.

ONLY if the client is not requesting a recalculation, go to Step 9.</td></tr>
</table>

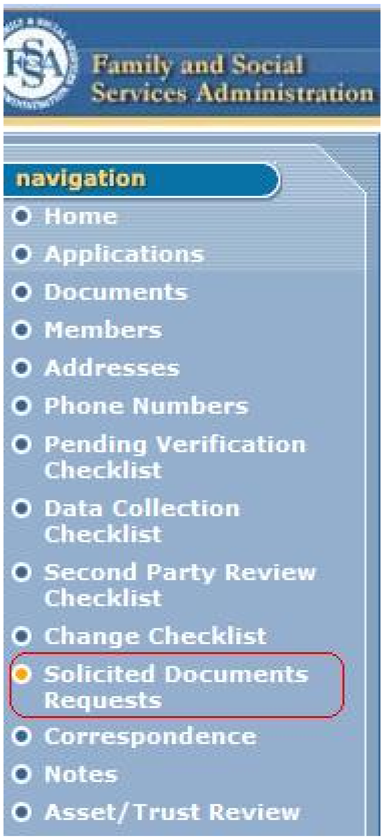
Step	Change Reported by Fax or Mail
9.	For a client who is not requesting recalculation, update the appropriate ICES screens, based on the information contained in the Report of Change-Healthy Indiana Plan form or another document submitted by the Client. Identify missing or incomplete information in ICES with a ?. If the recipient is receiving any other program benefits in addition to HIP and the change would affect the non-HIP case, create a Reported Change task from within the non-HIP standard case to be processed by (non-HIP) Changes WG3.
10.	Document the change report in CLRC, including the fact that no further action is being taken because the client is not requesting a recalculation.
11.	The task is now complete. To close the task, refer to 8.5.3.5 Processing a Change Received from the Call Center step 16 <insert hyperlink>

8.5.3.8 Request to Change Due Date of Solicited Documents

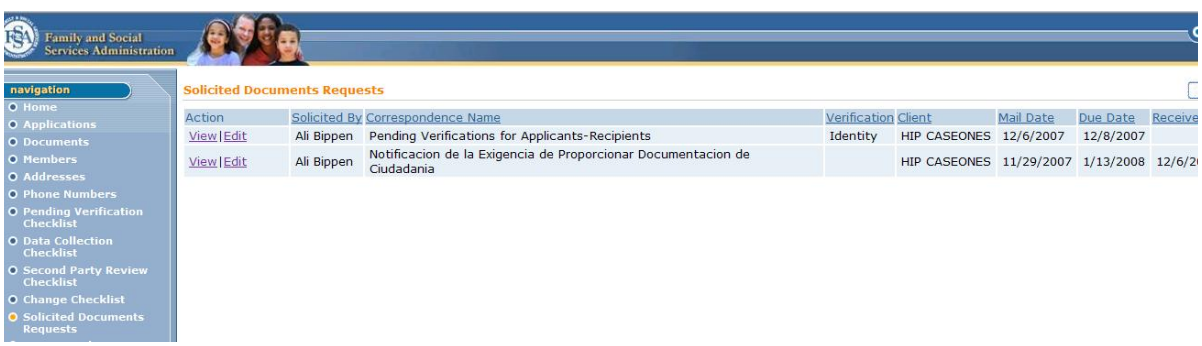
Client requests an extension to submit the verifications necessary to complete the processing of her case. A Due Date Extension Request task is received in the HIP Changes work queue to process the request to change the due date.

Step	Client requests change in due date of solicited documents
1.	Retrieve a task from the User Home page. Click *Task* to review the task information, which is Due Date Extension Request. 
2.	The information received on the User Defined task is that an individual has requested an extension on the due date for solicited documents.

<table>
<tr><th>Step</th><th>Client requests change in due date of solicited documents</th></tr>
<tr><td>3.</td><td>In WFMS, select Solicited Documents Requests from the left Navigation bar.



</td></tr>
<tr><td>4.</td><td>Review the list of pending solicited documents.



</td></tr>
<tr><td>5.</td><td>If the client can be given more time to submit the pending documents, go to Step 6.
If the client cannot be given more time to submit the pending documents, go to Step 7.</td></tr>
</table>

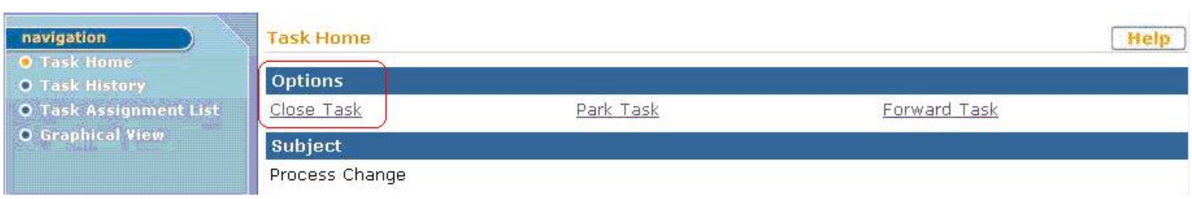
Step	Client requests change in due date of solicited documents
6.	Update the due date for the solicited document(s) that the individual has requested an extension for by selecting to Modify the due date of the solicited documents.  • Skip to Step 8.
7.	If an extension cannot be given for the solicited document(s), call the requesting individual and explain why the documents must be submitted by the due date. Also, explain what the results may be if the information is not received by the due date.
8.	Once the due date has been updated or the extension has been denied, update the case record comments in ICES.
9.	In ICES, enter the Running Record Comments on the ICES CLRC screen: • In NEXT TRAN, enter "CLRC". • In PARMS, enter the ICES Case Number and press **Enter**.  Or if currently in the ICES case, use **PF4** to automatically go to CLRC

<table>
<tr><th>Step</th><th>Client requests change in due date of solicited documents</th></tr>
<tr><td>10.</td><td>
The Running Record Comments will display.

- Under the COMMENTS section, update with all activities completed for the task and the new due date of the documents, if this was done, or the reason the extension request was denied.
- After all comments are added, press **Enter**.
</td></tr>
<tr><td>11.</td><td>
The following question displays:

- If the comments entered are correct and need to be added to the case record, press “Y” for yes.
- If the information ought not to be added to the case record, press “N” for no. However, since new comments were added, “N” is not selected at this time.
</td></tr>
<tr><td>12.</td><td>
The task is now complete. To close the task:

- Return to the WFMS Task Home page.
- Click *Close Task*.



For more detailed instructions on closing a task, refer to 8.5.3.5 Processing a Change Received from the Call Center. Step 16. <insert hyperlink>
</td></tr>
</table>

8.5.3.9 Changes Generated from ICES Alerts to Tasks

The following sub-sections detail the tasks generated which relate to maintaining cases and the steps for processing each type of task generated from an ICES Alert.

8.5.3.9.1 Processing Data Exchange Tasks

Data Exchange (DE) tasks are created from ICES data exchange alerts. Data Exchange is a system used to report changes such as earnings when someone has started a new job, change in Social Security Income, a change in Medicare coverage, child support received, etc. These are tasks generated which relate to maintaining a HIP case and steps for processing the task generated from an ICES Data Exchange alert. Table 1.2 lists the DE alerts that may be received on a HIP recipient and includes instructions to complete when the DE alert task is received.

Table 1.2 Data Exchange Alert

Data Exchange Alert	Task Instruction for Target Workgroup	Target Workgroup	Target Queue
352 – Prisoner Match, Check DEPM, DECT Generated when data from Social Security records indicate individual has been incarcerated.	Review DEPM to guarantee match is for the correct person. Send discrepancy notice/2032 or contact Client by phone. Complete DECT upon resolution. Update CLRC. Send case to state for eligibility review, if needed.	HIP Changes WG (3)	HIP Data Exchange
364 – SSA Reports Individual Deceased, check DENB Generated when SSA reports that an individual is deceased and ICES has that person in an open case.	Review DENB with RID number, change living type on AEIDC to 05 using date from DENB, update ICES case notes, send to State for Eligibility Review.	HIP Changes WG (3)	Changes
804 – Numident Discrepancy, Multiple SSN, DENB Generated when Numident match was processed and SSA has identified individual as having multiple SSNs in history.	Review data on DENB with data on AEIID and vital records associated with case. If there is an issue, send notice to Client, run AEABC, update case notes, return to queue until documents received. Update case and notes when documents received. Send case to state for review of eligibility. If you do not need to send documents, simply update case notes and send to state to review eligibility.	HIP Changes WG (3)	Changes

The following work instruction details the steps needed to complete DE alert tasks that come from Data Exchange.

Step	Processing Data Exchange Alert Tasks
1.	From the User Home page in WFMS, retrieve a new task either from Get Next Task or a task

<table>
<tr><th>Step</th><th>Processing Data Exchange Alert Tasks</th></tr>
<tr><td></td><td>
from the list under the My Tasks heading.

If already working in WFMS, the next task to be worked will appear on the Task Home page.
</td></tr>
<tr><td>2.</td><td>
The task displays in the Subject heading on the Task Home Page.

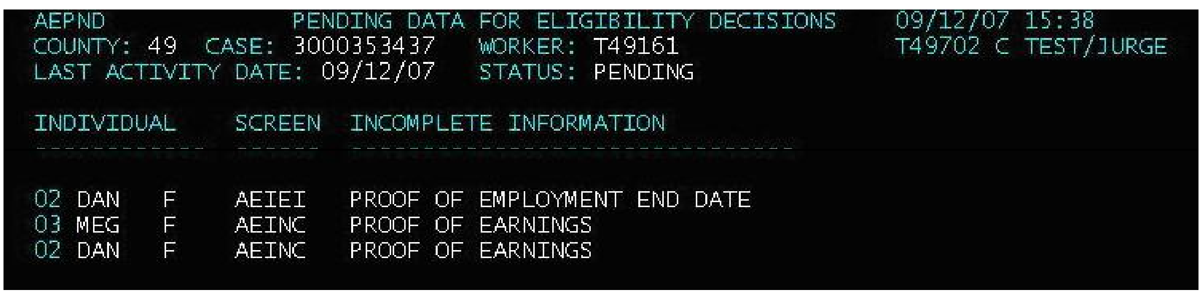
</td></tr>
<tr><td>3.</td><td>
Review the Subject and Task Instructions on the Task Home page.

- The Subject is shown in the following format: ICES Alert ### (example 804) and the name of the alert.

- The Task Instructions are specific to each type of task (converted from an alert). Each
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Processing Data Exchange Alert Tasks</th></tr>
<tr><td></td><td>category of a Data Exchange task differs in the way it is processed and by whom.

The task instructions also include the screens in ICES to review for the changed information or refer to Table 1.2, Data Exchange Alerts <insert hyperlink></td></tr>
<tr><td>4.</td><td>In ICES, review the Data Exchange Menu (MNDE) to determine what information is needed to access the DE screen listed in the task.</td></tr>
<tr><td>5.</td><td>In the ICES case related to the task update as much information as possible. Use Table 1.2, Data Exchange Alerts <insert hyperlink> to determine which screens need to be updated and what fields to update.</td></tr>
<tr><td>6.</td><td>Once the screens have been updated with the information received with the task, run AEABC.</td></tr>
<tr><td>7.</td><td>After running AEABC, review the pending information on ICES screen AEPND: Pending Data for Eligibility Decisions.


AEPND PENDING DATA FOR ELIGIBILITY DECISIONS 09/12/07 15:38
COUNTY: 49 CASE: 3000353437 WORKER: T49161 T49702 C TEST/JURGE
LAST ACTIVITY DATE: 09/12/07 STATUS: PENDING

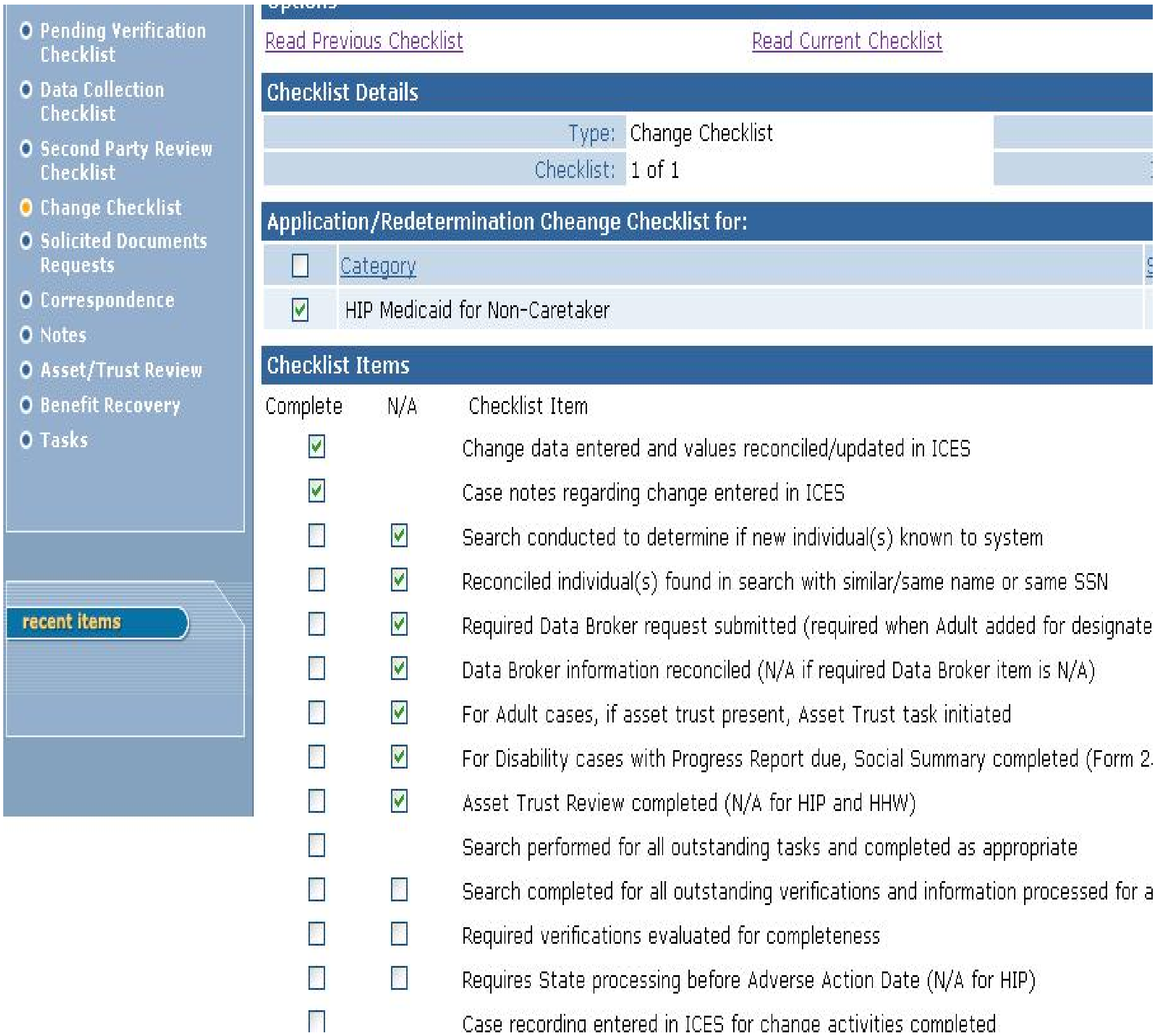
INDIVIDUAL SCREEN INCOMPLETE INFORMATION

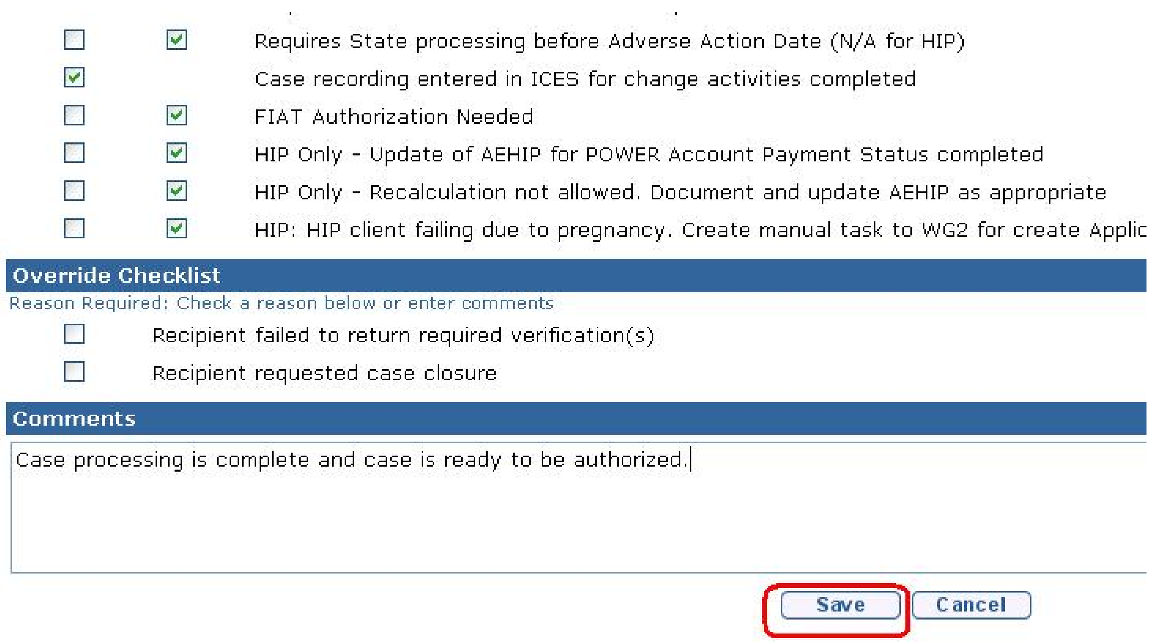
02 DAN F AEIEI PROOF OF EMPLOYMENT END DATE
03 MEG F AEINC PROOF OF EARNINGS
02 DAN F AEINC PROOF OF EARNINGS</td></tr>
<tr><td>8.</td><td>In WFMS under the Case Home page, select Pending Verification Checklist from the left Navigation bar link if additional verification is needed from the client. If no additional verification is needed, skip to step 10.</td></tr>
</table>

Step	Processing Data Exchange Alert Tasks
	
9.	Use the work instructions from Sending Notices on Creating Correspondence in the WFMS for sending a Pending Verification Notice and any other needed documents to the Client. Refer to Section 3.11.4.3, Sending Notices, Creating Correspondence in the WFMS <insert hyperlink>.

Step	Processing Data Exchange Alert Tasks
10.	From the Left Navigation select *Change Checklist*. 

Step	Processing Data Exchange Alert Tasks
11.	The Change Checklist now displays. Put a check in all the boxes under Checklist Items that have been completed and Save.



<table>
<tr><th>Step</th><th>Processing Data Exchange Alert Tasks</th></tr>
<tr><td>12.</td><td>If no verification has been requested or when requested verification has been received, it will be necessary to complete the checklist. The completion of the checklist and clicking on Save initiates a Ready for Review of Eligibility Determination task for an SEC.

</td></tr>
<tr><td>13.</td><td>Return to ICES and in the NEXT TRAN field; enter “CLRC” in the PARMS field, enter the ICES Case Number and press Enter.


Or if currently in the ICES case, use PF4 to automatically go to CLRC</td></tr>
</table>

<table>
<tr><th>Step</th><th>Processing Data Exchange Alert Tasks</th></tr>
<tr><td>14.</td><td>

The Running Record Comments will display.

Under the COMMENTS section, update with the information from the Data Exchange task such as:

- What information was updated
- What information was found
- For whom the Data Exchange alert was for
- If any pending verifications were requested
- When the information is due back

After all comments are added, press **Enter**.

</td></tr>
<tr><td>15.</td><td>

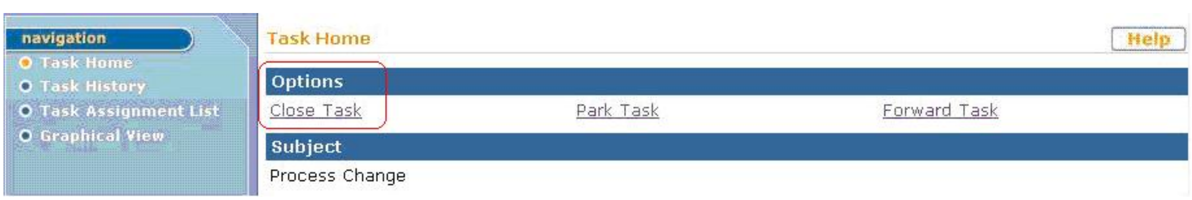
The following question displays:

- If the comments entered are correct and need to be added to the case record, press “Y” for yes.
- If the information entered is incorrect and should not to be added to the case record, press “N” for no.

</td></tr>
<tr><td>16.</td><td>

The task is now complete and needs to be closed. To close the task:

- Return to the WFMS Task Home page.
- Click *Close Task*.



For more detailed instructions on closing a task, refer to 8.5.3.5 Processing a Change Received

</td></tr>
</table>

Step	Processing Data Exchange Alert Tasks
	from the Call Center. Step 16. <insert hyperlink>

8.5.3.9.2 Processing ICES Alert Tasks

ICES alert tasks are created from ICES alerts that are converted to WFMS tasks through the nightly batch interface from ICES to WFMS. There are a limited number of ICES alerts that create tasks for HIP cases. Alerts related to appeal hearing activities on HIP cases will be assigned automatically to the Hearings queue.

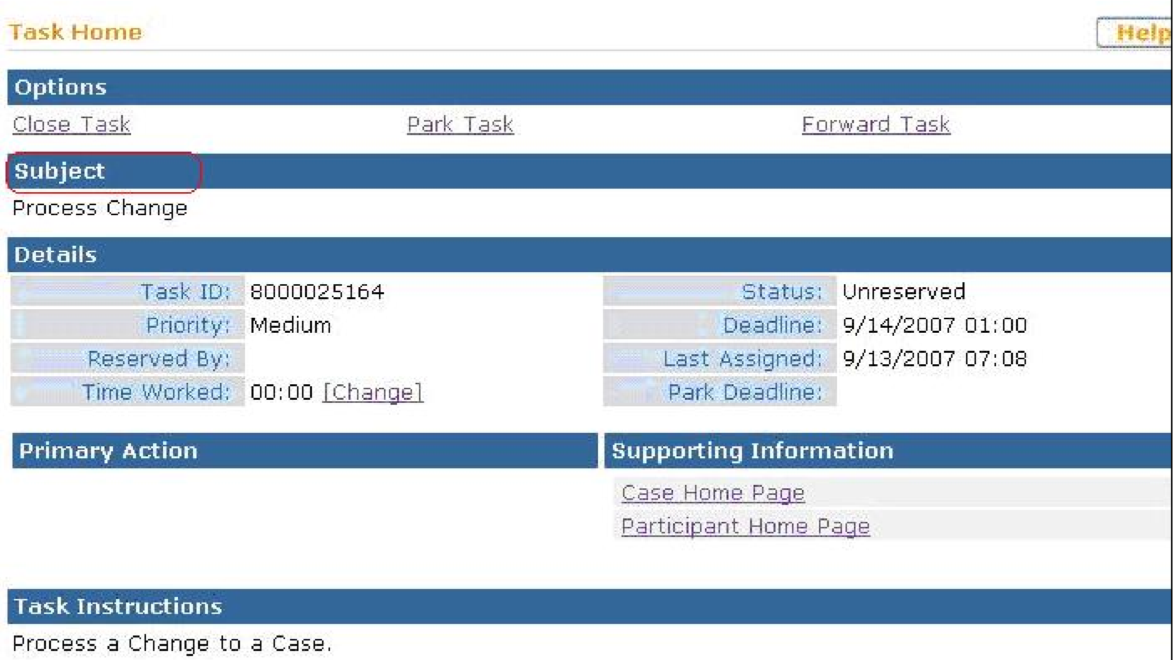
ICES Alert tasks 209, 221, 318 and 384 initiated on a HIP case will be assigned automatically to the HIP Changes queue and are generated to report a change or potential change so the case record can be reviewed and updated based on HIP program policy. Table 1.3 lists the ICES Alerts that may be received on a HIP recipient and includes instructions to complete when the DE alert task is received.

Table 1.3 ICES Alerts

ICES Alert	Task Instruction for Target Workgroup	Target Workgroup	Target Queue
209 – Run AEABC – TPL Updated Generated when TPL information is entered for Client into ICES.	Review AEFMC, verify information with Client. Run AEABC and document CLRC then forward to state for eligibility review.	HIP Changes WG (3)	HIP Data Exchange
221 – Run AEABC – TPL for HIP Updated	Review AEFMC and any documents in WGFMS that verify the TPL coverage currently found in the case. Request any additional information from the Client and update AEFMC as appropriate. Send to SEC to Review for Eligibility Determination when completed.	HIP Changes WG (3)	HIP Data Exchange
318 – Age 65 Run AEABC to change MA. Generated from system determination HIP Client is turning age 65 and will convert to MA A.	Review case, run AEABC. Category will change to MA A. Document in CLRC, then forward to state for eligibility determination.	HIP Changes WG (3)	HIP Data Exchange
384 – Individual Has Medicare Part B and No AEFMC. Generated when individual Part B coverage.	Review DEBN. Enter Part B information on AEFMC. Document into CLRC and pass on to state for eligibility determination.	HIP Changes WG (3)	HIP Data Exchange
Note: The following ICES alerts for Hearing related activities on HIP cases create tasks for the general Hearings Workgroup			
311 – Hearing Decision Completed, Review HEDE Generated when Hearings	Review screen HEDE and refer to Hearings Officer instructions for processing case. Document CLRC and send to state for	Hearings WG (7)	Hearings

ICES Alert	Task Instruction for Target Workgroup	Target Workgroup	Target Queue
enters decision into ICES.	eligibility review.		
309, 310 – Request for Fair/ Administrative Hearing. Screen HERQ. Generated when an appeal request is entered into HERQ.	Review HERQ to determine what the hearing is for. Contact Client for pre hearing conference and document result in CLRC. Prepare hearing packet, as needed.	Hearings WG (7)	Hearings
651 – Hearing Decision Due in 14 Days, HEIQ Generated to remind user that a hearings decision will be due.	Update case notes.	Hearings WG (7)	Hearings
652, 653 – Hearing Scheduled/Rescheduled, HESC Generated when a hearing is scheduled on HESC or changed.	Update case notes, prepare hearing packet, schedule pre hearing conference with Client and appear as representative at hearing.	Hearings WG (7)	Hearings

The following work instruction details the steps needed to complete DE alert tasks that come from Data Exchange. These changes are unrelated to the POWER account recalculation and fall within the changes that must be processed per the task instructions.

Step	Processing ICES Alert Tasks
1.	From the User Home page in WFMS, retrieve a new task either from Get Next Task or from the list of tasks under the My Tasks section.  If already working in WFMS, the next task to be worked will appear on the Task Home page.
2.	The task that displays in the Subject heading is from the Mass Change Alert work queue. 
3.	Review the Subject and Task Instructions on the Task Home page.  • The Subject of the task is: ICES Alert ### (example 209) and the name of the alert.  • The Task Instructions shown are specific to the alert that is represented as a task.

<table>
<tr><th>Ste p</th><th>Processing ICES Alert Tasks</th></tr>
<tr><td></td><td>

Each type of Alert task is different in the way it needs to be processed and by whom.

- The alert may also include the ICES screens to check that display information related to the alert.

</td></tr>
<tr><td>4.</td><td>

After reviewing the ICES screens as indicated by the instructions for the alert task received, initiate AEABC.

- In the NEXT TRAN field, type “AEABC”.
- In the PARMS field, type the Case Number that the task is for and press **Enter**.

</td></tr>
<tr><td>5.</td><td>Once AEABC has been processed, document the task and the actions taken associated with the task in the ICES case notes on CLRC: Running Record Comments.</td></tr>
<tr><td>6.</td><td>

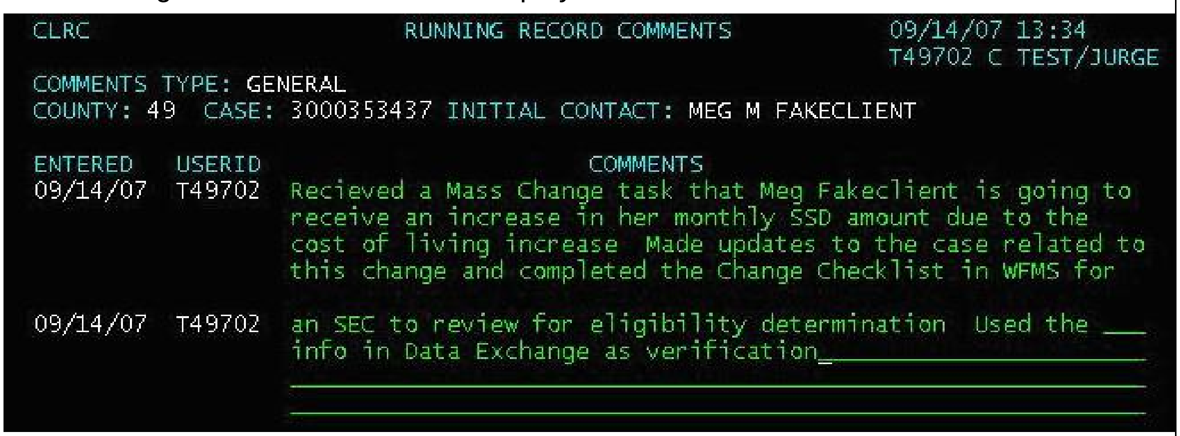
To enter Running Record Comments on the ICES CLRC screen:

- In NEXT TRAN, enter “CLRC”.
- In PARMS, enter the ICES Case Number and press **Enter**.

Or if currently in the ICES case, use **PF4** to automatically go to CLRC.

</td></tr>
<tr><td>7.</td><td>

The Running Record Comments will display.

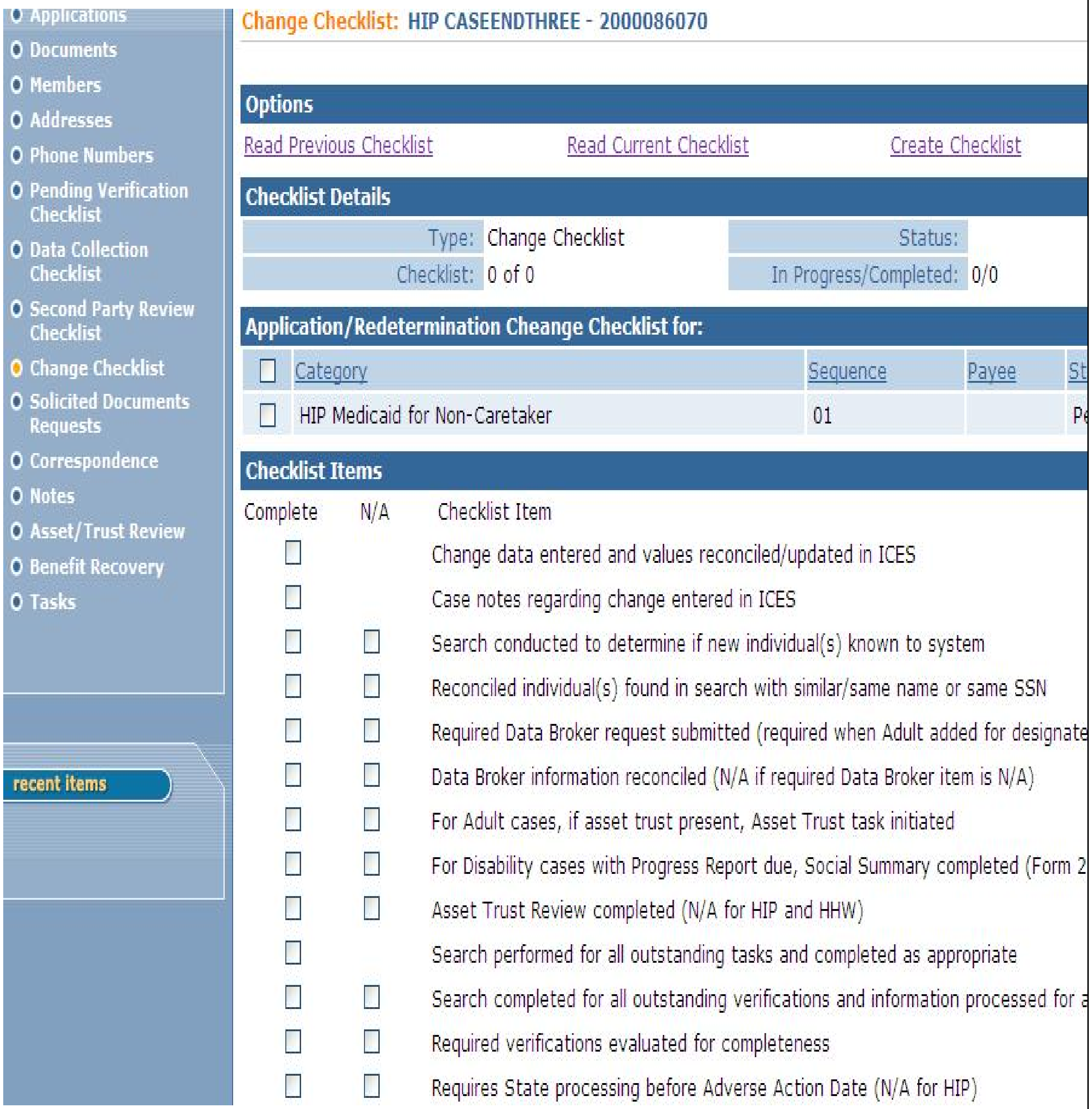


Under the COMMENTS section, update with the information related to the mass change task, such as:

- What the task was
- Who the change effected
- Any pending information that was requested
- When the information was requested

</td></tr>
</table>

Step	Processing ICES Alert Tasks
	• When the information is due back • Any actions taken related to the task After all comments are added, press **Enter**.
9.	The following question displays:  • If the comments entered are correct and need to be added to the case record, press “Y” for yes. • If the information ought not to be added to the case record, press “N” for no. However, since this is a new change, “N” is not selected at this time.
10.	Return to WFMS and on the Case Home page from the left Navigation bar, select *Change Checklist.* 

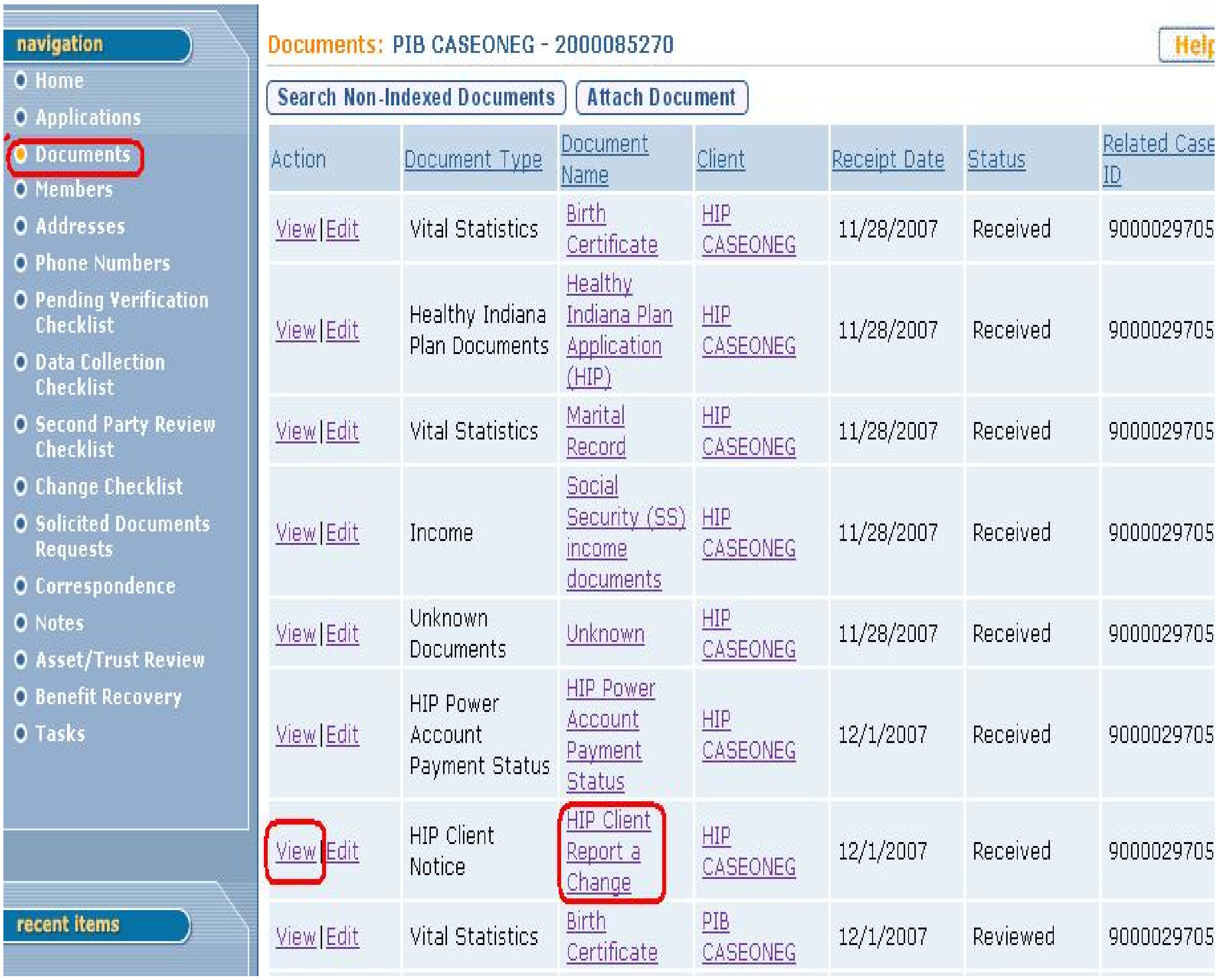
<table>
<tr><th>Step</th><th>Processing ICES Alert Tasks</th></tr>
<tr><td>11.</td><td>Complete as much of the Change Checklist as possible. Once this has been updated, close the checklist and return to the Case Home page. The completion of the checklist initiates a Ready for Review of Eligibility Determination task for an SEC.

</td></tr>
<tr><td>12</td><td>To complete the task, refer to 8.5.3.5 Processing a Change Received from the Call Center, step 16. <insert hyperlink></td></tr>
</table>

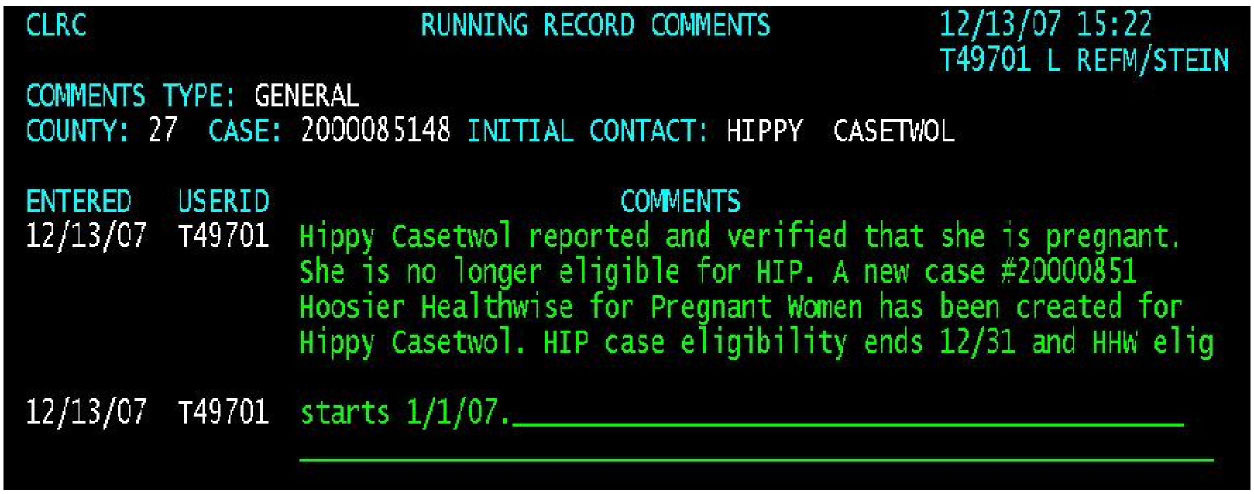
8.5.3.10 Processing a Change Resulting In HIP Closure Due to Eligibility for Medicaid

Based on HIP program policy, certain changes will result in ineligibility for HIP. Updates to information on the ICES screen AEHIP may result in the recipient no longer being eligible for

HIP. These may also occur when processing tasks created by ICES Data Exchange alerts see Table 1.2, Data Exchange Alerts in Section 8.5.3.9.1, Processing Data Exchange Tasks <insert hyperlink>.

If a HIP recipient reports she is pregnant, entry of that information in the ICES HIP case will result in the pregnant woman no longer being eligible for HIP. When this occurs, Medicaid coverage for the pregnant women is created in an existing or new non-HIP case. If a HIP recipient becomes eligible for another category of Medicaid such as MA D, the client is no longer eligible for HIP. Similar actions occur when ICES alert 318 creates an Age 65 run AEABC to change MA cat task for a HIP recipient see Table 1.3, ICES Alerts in Section 8.5.3.9.2, Processing ICES Alert Tasks <insert hyperlink>.

Step	Processing a Change Resulting in HIP Closure Due to Eligibility for Medicaid
1.	Review the change report documents that have been received or the Data Exchange tasks instructions. 
2.	Retrieve the case in ICES. • In NEXT TRAN, enter AEHIP or AEIID if the change is pregnancy for a HIP recipient • In PARMS, enter in the ICES Case Number. If the change affects any fields on AEHIP, enter the new information in the appropriate field.
3.	If the change being processed is for a HIP recipient who is now pregnant you will also need to enter Y in the PREG? Field on AEIID. Additional details regarding the pregnancy will be entered on AEIPI.
4.	In ICES, update the case record comments based on the information related to the task and the documents that were received. To enter Running Record Comments on the ICES CLRC screen: • In NEXT TRAN, enter "CLRC".

Step	Processing a Change Resulting in HIP Closure Due to Eligibility for Medicaid
	• In PARMS, enter the ICES Case Number and press **Enter**.  Or if currently in the ICES case, use **PF4** to automatically go to CLRC.
5.	The Running Record Comments display.  Under the COMMENTS section, update with the information regarding: • Date the change was reported • Who reported the change • All verifications received • All updates made to the case related to the reported change • Any change in possible eligibility of the HIP program If a new case has been created for the individual in WFMS and ICES in order to open an Eligibility case for the Client as she is pregnant and needs to now be on Hoosier Healthwise for Pregnant Women • The ICES Case Number of the new case created • If the Client was receiving any other benefits indicate with case is open in ICES and when the Client was added to that case.
6.	The following question displays:  • When the comments entered are correct and ready to be added to the case record, press “Y” for yes. • If the information ought not to be added to the case record, press “N” for no. However, since this is a new change, “N” is not selected at this time.
7.	If the HIP case or AG must be closed due to the pregnancy of the HIP recipient, refer to the work instructions in Section 3.5.3.11 Creating an Application Case <insert hyperlink>; create a

Step	Processing a Change Resulting in HIP Closure Due to Eligibility for Medicaid
	new Application Case in WFMS and ICES for the individual. Skip to step 12. If the individual already has an open Eligibility case in ICES, then add the pregnancy to that case following the instructions from Section 3.5.4.8 Add a New Program <insert hyperlink>.
8	Follow the work instructions in 8.5.3.5 Processing a Change Received from Call Center, steps 10 – 17. <insert hyperlink>

8.5.3.11 Processing a Change Resulting in HIP Ineligibility

Certain reported changes result in closure of a HIP case without Medicaid eligibility. Qualifying events that would result in closure of HIP are:

- Member moving out of state.
- Death of a member.
- Member gains access to health insurance or acquires Medicare.
- Member attains age 65.

Step	Processing a Change Resulting in HIP Ineligibility
1.	From the User Home page in WFMS, retrieve the task. Click the Task. The system navigates to the Task Home page. The task displayed is Reported Change. The task instructions are: Process a reported change to a case. 

<table>
<tr><th>Step</th><th>Processing a Change Resulting in HIP Ineligibility</th></tr>
<tr><td>2.</td><td>

Click the Case Home Page link under Supporting Information.

The Case Home page is displayed.

</td></tr>
<tr><td>3.</td><td>

From the Case Home page, click Documents on the Left Navigation Bar.

</td></tr>
</table>

4. On the Documents page, check to see if any documents have been provided to support the change document.

Documents: PIB CASEONEG - 2000085270 Help

Search Non-Indexed Documents | Attach Document

Action	Document Type	Document Name	Client	Receipt Date	Status	Related Case ID
View | Edit	Vital Statistics	Birth Certificate	HIP CASEONEG	11/28/2007	Received	9000029705
View | Edit	Healthy Indiana Plan Documents	Healthy Indiana Plan Application (HIP)	HIP CASEONEG	11/28/2007	Received	9000029705
View | Edit	Vital Statistics	Marital Record	HIP CASEONEG	11/28/2007	Received	9000029705
View | Edit	Income	Social Security (SS) income documents	HIP CASEONEG	11/28/2007	Received	9000029705
View | Edit	Unknown Documents	Unknown	HIP CASEONEG	11/28/2007	Received	9000029705
View | Edit	HIP Power Account Payment Status	HIP Power Account Payment Status	HIP CASEONEG	12/1/2007	Received	9000029705
View | Edit	HIP Client Notice	HIP Client Report a Change	HIP CASEONEG	12/1/2007	Received	9000029705
View | Edit	Vital Statistics	Birth Certificate	PIB CASEONEG	12/1/2007	Reviewed	9000029705
View | Edit	Income	Employer Statement	PIB CASEONEG	12/1/2007	Reviewed	9000029705
View | Edit	Vital Statistics	Social Security Card or Proof	PIB CASEONEG	12/1/2007	Reviewed	9000029705
View | Edit	Correspondence	General Document Cover Sheet (English)	PIB CASEONEG	12/7/2007	Accepted	9000029705
View | Edit	Income	Pay Statement	PIB CASEONEG	12/7/2007	Accepted	9000029705
View | Edit	Income	Pay Statement	PIB CASEONEG	12/7/2007	Received	2000085270

5. Retrieve the case in ICES.

- In NEXT TRAN, enter AEHIP.
- In PARMS, enter in the ICES Case Number.

NEXT TRAN: AEHIP_ PARMS: 3000353437_

If the change affects any fields on AEHIP, enter the new information in the appropriate field.

6. Navigate to and update any other screens in ICES relevant to the changed information. Examples would be to access AEICI to enter a new address, AEIDC to record death of a member or AEFMC to enter insurance or Medicare information.

After completing the necessary screens, run AEABC to propose closure.

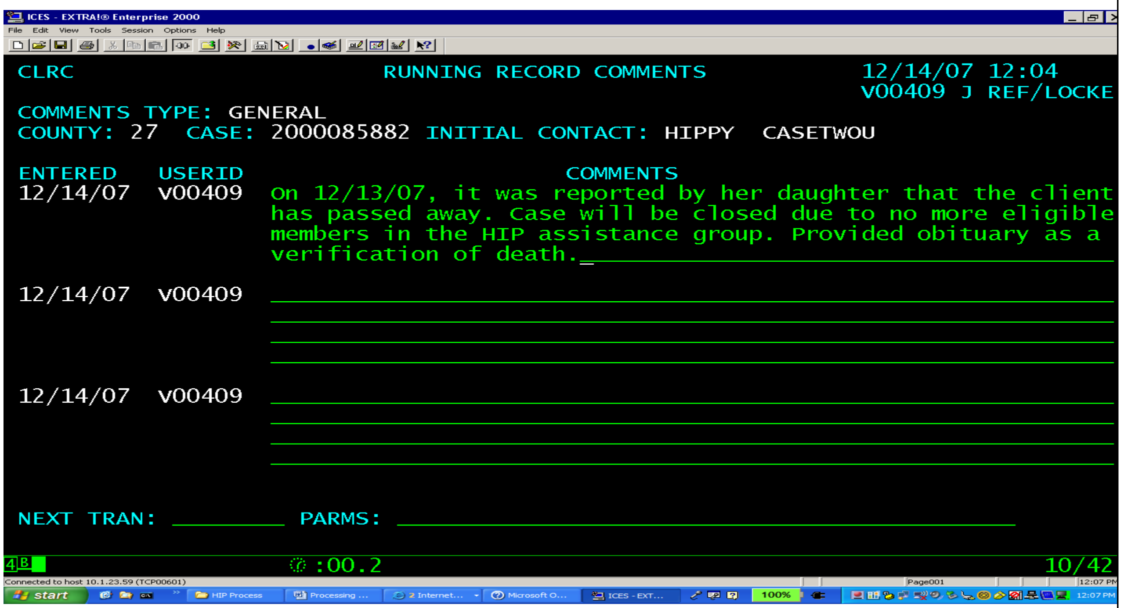
7. In ICES, update the case record comments based on the information related to the task and the documents that were received.

To enter Running Record Comments on the ICES CLRC screen:

- In NEXT TRAN, enter “CLRC”.
- In PARMS, enter the ICES Case Number and press **Enter**.

Or if currently in the ICES case, use **PF4** to automatically go to CLRC.

8. The Running Record Comments display.



Under the COMMENTS section, update with the information regarding:

- Date the change was reported
- Who reported the change
- All verifications received
- Reason the case was closed.

9. When you press Enter, the following question displays:

- When the comments entered are correct and ready to be added to the case record, press “Y” for yes.

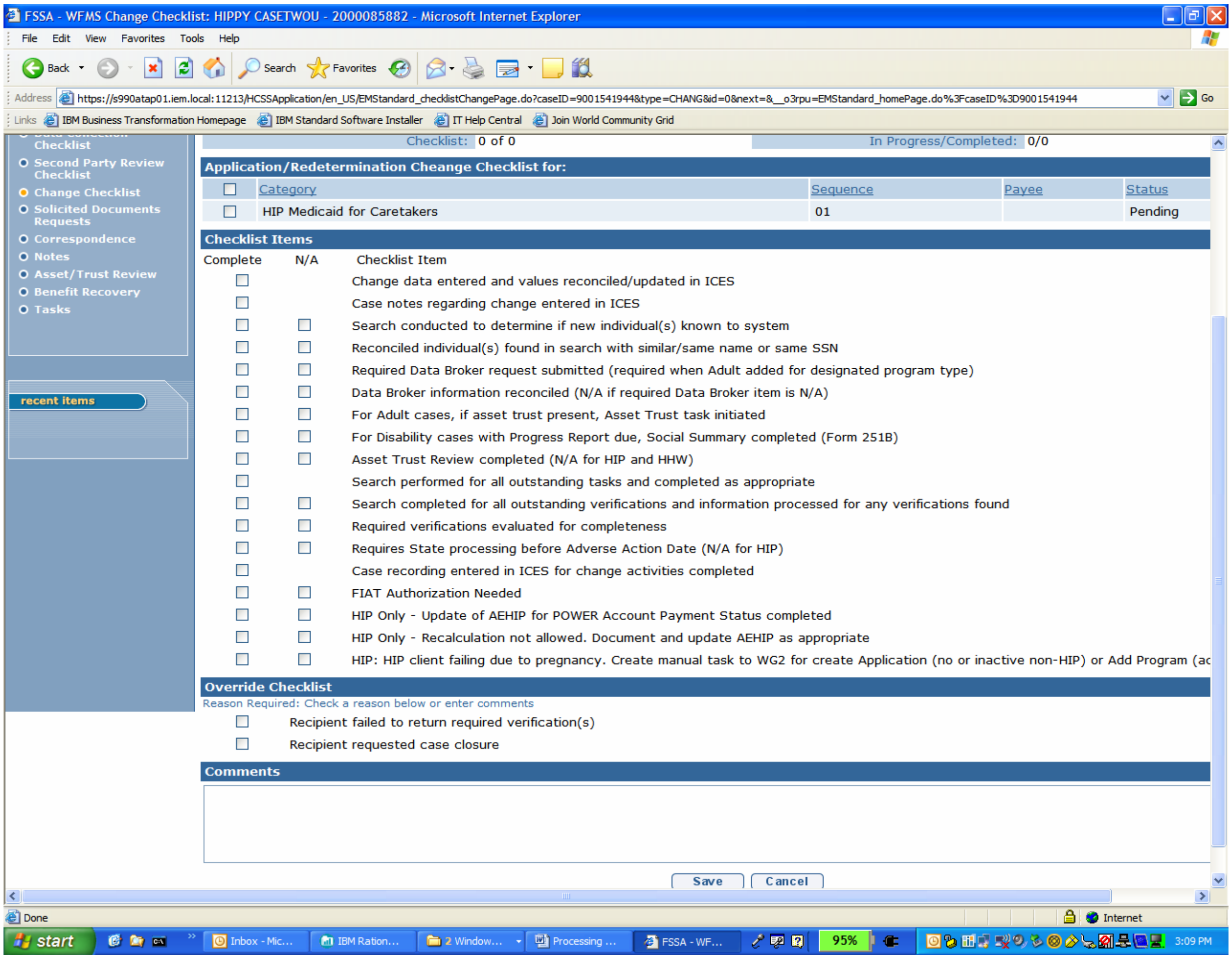
10. If the necessary verification to provide proof of the change is in the case, go to Step 11.

If documents are needed to provide proof of the change, please refer to:

<Insert Hyperlink> HIP Work Instructions 8.5.3.5, Processing Changes Received from the Call Center, steps 10 through 17.

11.	Return to the Case Home page and from the left Navigation bar select *Change Checklist* and complete as much as possible on the list to indicate what actions have been taken to process the change. If verification has been requested, go to step 12. If no verification has been requested, skip to step 13. 
12.	Complete as much of the Change Checklist as possible. Use the save button at the bottom of the screen to update. Once this has been updated, close the checklist and return to the Case Home page.

13. Completing and saving the checklist automatically creates and sends a Ready for Review of Eligibility Determination task to the appropriate FSSA queue for completion by an SEC.



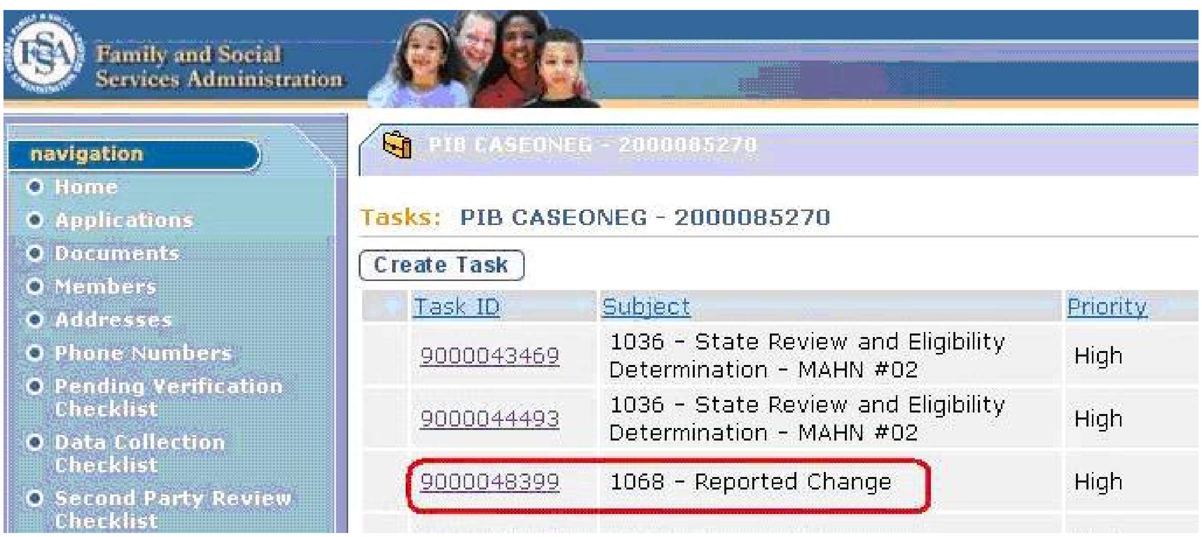
<table>
<tr>
<td>14.</td>
<td>

The task is now complete. Return to the Case Home page and click Tasks to display the Task list.

</td>
</tr>
<tr>
<td>15.</td>
<td>

From the Task list, review the task. If you created a Ready for State Review and Eligibility Determination task for SEC, or a Reported Change task for WG3, the task will display on the Tasks page.

Select the Reported Change Task.



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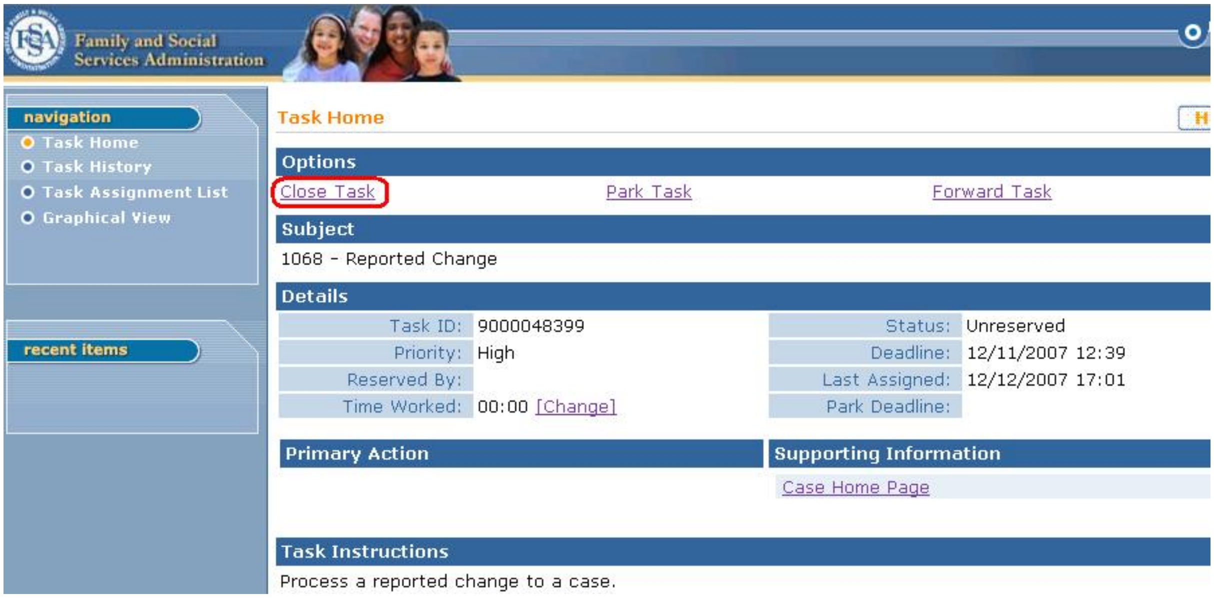
</table>

<table>
<tr>
<td>16.</td>
<td>
Click the Task ID, which will display the Task Home page. Click Close Task under the Options selection if you are ready to close the task.

Refer to Section 3.11.1 Creating, Parking, Forwarding,, Getting and Opening Tasks if you need to Park or Forward the task. <insert hyperlink>



</td>
</tr>
</table>